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ABSTRACT

This package contains instructor's guide sheets and student task assignment sheets for Modules R 1-45 of the competency-based curriculum in retailing developed for use in secondary and postsecondary schools in Kentucky. Some of the topics covered in the modules include the following: retailing--past, present, and future; retailing occupations; introduction to the retailing curriculum; Distributive Education Clubs of America; ordering merchandise; processing customers' special orders; safety in the warehouse and store; receiving shipments of merchandise; opening containers; checking in merchandise; damage reports; stacking merchandise; moving materials in the warehouse and store; obtaining merchandise from storage and delivering to sales floor; price marking and stocking; checking in merchandise from receiving area; inventory; preparing goods for return to vendor; transferring merchandise to branch stores; making signs; setting up displays; dressing mannequins; opening and closing the store; operating the cash register; gift wrapping; selling on the floor; and handling customer complaints. For each module, the instructor's guide sheet contains objectives, attitudes and values, contents of the module, checkout activities, learning activities, suggested references, notes and suggestions for instruction, references and special tools and equipment, and the instructor's final checklist with answer key. Some module guide sheets contain narratives for slide-tape presentations, and some are illustrated with line drawings. The student task assignment sheets for each module present an introduction, directions, objectives, instruction sheets, learning activities, a student self-check, a copy of the instructor's final checklist, and checkout activities.

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Instructor's

Guide Sheets

RETAILING

Competency - Based Education

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Raymond Barber, Superintendent of Public Instruction

INSTRUCTOR'S GUIDE

TO

LEARNING ACTIVITIES

Instructor's Guide Sheets

*Master Copies of Student Self-Checks and/or Instruction Sheets on Which Students Write

Master Copies of the Instructor's Final Checklist

*Master Copies of Check-Out Activity Sheets

Answer Keys for Check-Out Activity Sheets

Narration for Slide-Tape Presentations

[Student Package]

*These master copies may be bound separately depending on the number of copies included in the program.

RETAILING: PAST, PRESENT, AND FUTURE

OBJECTIVE

Given a test concerning the history of retailing, its present, and its future, answer the questions. The test must be completed with 100% accuracy.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

-- Students will realize that the present state of retailing has been an accomplishment that has taken many people many years to develop.
-- Students will realize that retailing is an ever-changing industry and that there are still many changes to be made by those who select it as a career.
-- Students will realize that there are, in the history of retailing, many people who were and who are dedicated to serving the needs of people.

CONTENTS OF MODULE

Student Self-Check	Learning Activity Number
I RETAILING: THE PAST, THE PRESENT, AND THE FUTURE..	2
Instructor's Final Checklist	
RETAILING: PAST, PRESENT, AND FUTURE...............	3

CHECK-OUT ACTIVITY

Your instructor will give you a test concerning the history of retailing, its present, and its future. Answer the questions.

Check-Out Activity Sheet	
RETAILING: PAST, PRESENT, AND FUTURE...............	3
ANSWER KEY..	3

SUGGESTED REFERENCES

Gillespie and Hecht, Retail Business Management. Manchester, MO: Gregg Division/McGraw-Hill Book Company, 1983.

Warmke, Palmer, and Nolan, Marketing in Action. Cincinnati, OH: South-Western Publishing Company, Eighth Edition.

RETAILING: PAST, PRESENT AND FUTURE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Compile a bibliography of books that are available in the school library that concern: (1) the people who contributed to the growth and development of retailing, (2) the history of retailing. Give the students supplemental reading assignments. Discuss the history of retailing; highlight the contributions of specific people; broaden the "ideas of the future" concepts. Have students brainstorm "ideas for future changes in retailing." Ask students for oral reports concerning assigned readings.	SUGGESTED REFERENCES Gillespie and Hecht, Retail Business Management, pp. 1-12. AND Warmke, Palmer, and Nolan, Marketing in Action, pp. 78-99.	
2	STUDENT SELF-CHECK I This activity gives you an opportunity to become better acquainted with your students as they have been instructed to discuss further changes with the instructor.	Student Self-Check I, RETAILING: THE PAST, THE PRESENT, AND THE FUTURE --An answer key is provided in this section of the manual.	
3	Provide a Check-Out Activity Sheet for each student. Use the Answer Key, provided in this section of the manual, to check the answers.	--Copies of the Check-Out Activity Sheet. (A Master Copy and an Answer Key are provided in this section of the manual.)	

RETAILING: PAST, PRESENT AND FUTURE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

RETAILING: THE PAST, THE PRESENT, AND THE FUTURE

ANSWERS

1. b
2. +
3. +
4. d
5. e
6. +
7. +
8. +
9. +
10. Answers will vary.

CHECK-OUT ACTIVITY SHEET

RETAILING: PAST, PRESENT, AND FUTURE

Directions: The following questions are either true or false. If the statement is true, circle the + symbol; if it is false, circle the - symbol.

1. ± Bartering is the act of a person exchanging goods or services for another person's goods or services.

2. ± Retailing has developed because people do not have time to produce merchandise to satisfy all of their needs.

3. ± The general store has totally disappeared from the retailing scene.

4. ± Retailing was started in America by "peddlers" who sold merchandise from horse- or mule-drawn wagons.

5. ± Retailing began to grow as the Industrial Revolution grew.

6. ± Retailers provide a place for people to purchase merchandise that will satisfy their needs.

7. ± Malls and shopping centers can be described as places located where people can purchase many items of merchandise conveniently.

8. ± Retailing is an ever changing industry.

9. ± Retailing has developed to its present state because of people action.

10. ± Retailers perform a service for people by providing a place where manufacturers can conveniently sell their merchandise and where people can conveniently satisfy their needs for merchandise.

11. ± The retailing industry offers many and varied opportunities of employment for people.

12. ± The retailing industry has changed throughout its history and will change as the people in the industry work to find better ways to best serve the needs of the people it serves--its customers.

Directions: Read the following statements and circle the best answer that correctly completes each.

13. Shopping centers and malls were built because:

    a. A large number of people liked to shop in the country.
    b. People moved from the center of towns and cities to areas called suburbs and the retailers wanted to offer these people a convenient location for shopping.

CHECK-OUT ACTIVITY SHEET, (page 2)

c. Everyone owned a car.
d. Buses stopped serving downtown stores.

14. General stores became department stores because:

a. Retailers decided that it would be easier for the customer to shop if the many items of merchandise carried in the general store were grouped into areas where the customer could easily purchase similiar or like items.
b. A large building would be nice to have.

15. Retailers developed a way to offer merchandise to people who live in rural areas. The way they did and still do this is called by:

a. Cash and carry.
b. Longer store hours.
c. Catalog sales.
d. Mule- and horse-drawn wagons.

16. Retailers have developed many ways to better serve their customers. Which one of the answers did retailers not directly develop?

a. Charge accounts
b. One-price policy
c. Shopping centers and malls
d. Over-night postal service

17. Retailing can best be defined as:

a. An industry with a primary objective of offering people merchandise at a convenient location, in the amount that they need, at a time when they need it, and at a price they can pay.
b. An industry that is interested only in constructing shopping malls and shopping centers.
c. An industry that manufacturers merchandise.

18. Retailing is a constant changing industry. Retailers are always looking for new ways to serve their customers. Circle the letter of the statement that describes one present retailing change.

a. Automated (computer) check-out
b. Bartering
c. Trading posts
d. Department stores

19. You have read the history of retailing. You have learned that its history is full of change. What changes can you think of which would help the retailing industry better serve the needs of its customers? List these changes.

CHECK-OUT ACTIVITY SHEET, (page 3)

20. Changes will occur in retailing, but for these to take place people must plan and make them happen. List some of the future changes that you think could occur in retailing.

CHECK-OUT ACTIVITY SHEET

RETAILING: PAST, PRESENT, AND FUTURE

ANSWERS

1. +
2. +
3. -
4. +
5. -
6. +
7. +
8. +
9. +
10. +
11. +
12. +
13. b
14. a
15. c
16. d
17. a
18. a
19. Answers will vary.
20. Answers will vary.

RETAILING OCCUPATIONS

OBJECTIVE

Given a list of occupations and tasks, correctly identify the retailing occupations and the retailing tasks.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that retailing tasks are performed by many people and that these tasks can be learned by those who are interested in the retailing industry.
--Students will realize that there are many people employed in the retailing industry who perform varied and interesting tasks.

CONTENTS OF MODULE

Instructor's Final Checklist	Learning Activity Number
RETAILING OCCUPATIONS..............................	5

CHECK-OUT ACTIVITY

Your instructor will provide a list of retailing occupations and tasks. Identify the occupations and tasks.

Check-Out Activity Sheet	
RETAILING OCCUPATIONS..............................	5
ANSWER KEY...	5

RECOMMENDED REFERENCE

Richert, Meyer, and Haines, *Retailing Principles and Practices*. Manchester, MO: Gregg Division/McGraw-Hill Book Company, Fifth Edition.

RETAILING OCCUPATIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Select descriptions of specific retailing occupations from the Occupational Outlook Handbook. Have students give large or small group oral reports about the specific occupations. They should include: --General description of the occupation, --Specific tasks performed, --Tools and equipment, --Education requirements, --Future outlook for employment. Supplemental audio-visual materials may be used to show students retailing workers at work. If possible, plan a retailing field trip to show students retail workers on the job. Include the behind-the-scenes workers: receiving clerks, stock clerks, markers, and salespeople.	SUGGESTED REFERENCE Richert, Meyer, and Haines, Retailing Principles and Practices, pp. 553-562. STP: "Careers in Retailing and Marketing," Fairchild.	
2	Discuss, with the students, the specific retailing occupations. Include: --Receiving clerk, stock clerk, salesperson --Knowledges needed, --Tasks performed, --Tools and equipment needed, --Future outlook for employment.		

RETAILING OCCUPATIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Have a guidance counselor visit the class to explain the handbook and to discuss interest and aptitude tests.	SUGGESTED REFERENCE Occupational Outlook Handbook, U.S. Dept. of Labor.	
3	Help students set up interviews with retailing workers. If interviews cannot be arranged, have retailing workers speak to large or small groups in the classroom. Have the students record information for later discussion.		
4	Have students interview retailing workers. Emphasize that their interviews obtain information concerning: --Knowledges needed, --Tasks performed, --Tools and equipment used.	--Copies of the JOB INTERVIEW FORMAT. (A Master Copy is included in this section of the manual.) --Copies of the INTERVIEW SUMMARY FORM-Retailing Occupations. (A Master Copy is included in this section of the manual.)	
5	Provide a copy of the Check-Out Activity Sheet for each student. Check the answers using the answer key provided in this section of the manual. Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Check-Out Activity Sheet. (A Master Copy is provided in this section of the manual.) --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

RETAILING OCCUPATIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Discuss career objectives with each student. Discuss with each how the retailing vocational education program can help them achieve their career objectives.		

JOB INTERVIEW FORMAT

DATE OF THE INTERVIEW: ______________________________

OCCUPATION OF THE RETAIL PERSON BEING INTERVIEWED: ________________________

I. ON-THE-JOB ACTIVITIES OF THE PERSON INTERVIEWED:

II. TOOLS, EQUIPMENT AND MATERIALS USED ON-THE-JOB:

III. KNOWLEDGES AND SKILLS NEEDED TO DO THE JOB:

IV. SUMMARY OF INTERVIEW (description of the occupation):

INTERVIEW SUMMARY FORM

RETAILING OCCUPATIONS

The report of your interviews contains the following. (Circle the correct response.

YES NO 1. It includes a realistic listing of the on-the-job tasks performed by each of the retailing employees.

YES NO 2. It includes a realistic listing of the tools, equipment, and materials used on-the-job by each of the retailing employees.

YES NO 3. I gained a better understanding of retailing occupations by conducting these three interviews.

YES NO 4. The summary of my findings was organized logically, was grammatically correct, was is in a readable format.

YES NO 5. I made a well-organized presentation of my findings to the class.

CHECK-OUT ACTIVITY SHEET

RETAILING OCCUPATIONS

Directions: Place an "O" beside the number if it lists a retailing occupation. Place a "T" beside the number if it lists a retailing task.

1. Stock clerk
2. Write requests for show cards
3. Welder
4. Receiving clerk
5. Check in-coming merchandise
6. Stock merchandise on sales floor
7. Department manager
8. Buyer
9. Assistant buyer
10. Sell merchandise
11. Cut metal with cutting tip
12. Report damaged, lost, and broken merchandise
13. Store merchandise
14. Write charge tickets
15. Write cash tickets
16. Process bank card sales
17. Hand letter show cards
18. Build window displays
19. Price mark merchandise
20. Legal secretary
21. Salesperson
22. Special order merchandise
23. Process merchandise requisitions

BEST COPY AVAILABLE

CHECK-OUT ACTIVITY SHEET, (page 2)

24. Call merchandise orders to wholesalers
25. Drafter
26. Enter invoices on invoice register
27. Open containers
28. Operate material handling equipment
29. Maintain stock record cards
30. Transfer stock to branch stores
31. Store manager
32. Price mark merchandise
33. Change prices on merchandise
34. Straighten displays
35. Dismantle displays
36. Dress mannequins
37. Close department
38. Prevent, detect and report shoplifting
39. Make change
40. Package/bag customer's purchases
41. Process lay-away sales
42. Adjust customer's complaints
43. Process customer's exchanges
44. Answer customer's inquiries
45. Open sales
46. Present and demonstrate merchandise

CHECK-OUT ACTIVITY SHEET, (page 3)

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47. Close sales
48. Sale related merchandise
49. Assist in training new employees
50. Handle accidents

CHECK-OUT ACTIVITY SHEET

RETAILING OCCUPATIONS

ANSWERS

1. O
2. T
4. O
5. T
6. T
7. O
8. O
9. O
10. T
12. T
13. T
14. T
15. T
16. T
17. T
18. T
19. T
21. O
22. T
23. T
24. T
26. T
27. T
28. T
29. T
30. T
31. O
32. T
33. T
34. T
35. T
36. T
37. T
38. T
39. T
40. T
41. T
42. T
43. T
44. T
45. T
46. T
47. T
48. T
49. T
50. T

INTRODUCTION TO THE RETAILING CURRICULUM

OBJECTIVE

Given a test about the retailing curriculum, answer the questions. The test must be completed with 100% accuracy.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will realize that retailing offers them an exciting, challenging, and rewarding career potential.
--The students will realize that the retailing curriculum in which they have elected to enroll will prepare them for future jobs in retailing.
--The students will realize that they will have to learn the knowledges and skills necessary to perform the tasks of retailing if they are to succeed in a retailing occupation.
--The students will realize that by enrolling in the retailing vocational education program, they will be prepared for three of the retailing occupations: receiving clerk (retail), stock clerk (retail), and retail salesperson.

CONTENTS OF MODULE

Student Self-Check	Learning Activity Number
I THE RETAILING CURRICULUM..........................	3

Instructor's Final Checklist	
INTRODUCTION TO THE RETAILING CURRICULUM............	4

CHECK-OUT ACTIVITY

Your instructor will give you a test concerning the retailing curriculum. Answer the questions.

Check-Out Activity Sheet	
INTRODUCTION TO THE RETAILING CURRICULUM............	4
ANSWER KEY..	4

RECOMMENDED AUDIO-VISUAL MATERIALS

Slide-tape presentation R-3, "Introduction to the Retailing Curriculum."	(LA 2)

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INTRODUCTION TO THE RETAILING CURRICULUM

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss in large or small groups the retailing curriculum. Emphasize: --Tasks to be learned; --How tasks will be learned; --How all classroom activities will focus on learning a specific occupation; i.e., receiving clerk, stock clerk, and salesperson. Show student how to use learning resources i.e., audio-visual equipment, references, resources, etc. Give the students a listing of tasks (skills) to be learned. Discuss how the task will be learned: --Teacher-led discussions; --Large- and small-group discussions and practice; --Individual practice; --References and resources; --Audio-visual materials; --Field trips.	--Instructor's Copy of "Introduction to the Retailing Curriculum," (See this section of the manual.)	
2	After viewing the slide-tape presentation, discuss in large or small groups the many retailing occupations. Emphasize entry level occupations.	Slide-tape presentation: R-3, "Introduction to the Retailing Curriculum."	

INTRODUCTION TO THE RETAILING CURRICULUM

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	Assist the students with Student Self-Check I.	--An answer key is provided in this section of the manual.	
4	Discuss, with each student, the Check-Out Activity Sheet.	--Copies of the Check-Out Activity Sheet, INTRODUCTION TO RETAILING CURRICULUM. (A Master Copy is provided in this section of the manual.)	
	Determine if each student: --Understands the retailing curriculum. --Understands how he/she will learn retailing tasks. --Knows what the retailing tasks are. --Understands the occupations in which he/she will be learning tasks.		
	Use the answer key to evaluate each student's answers. Discuss the answers with each student.	--An answer key (in this section of the manual.)	
	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies if the Instructor's Final Checklist, INTRODUCTION TO THE RETAILING CURRICULUM. (A Master Copy is provided in this section of the manual.)	

"Introduction to the Retailing Curriculum"

You have elected to be a retailing instructor, an instructor of a vocational education program with a primary objective of helping young people learn the knowledges and skill of three occupations within the occupational arena of retailing. You will be assisting these young people in learning knowledges and skills which will help them acquire gainful employment within an occupation that can offer them many moments of pleasure, excitement, and satisfaction in helping others satisfy needs for consumer goods and services.

The introduction to the retailing curriculum is one of the most important presentations in the total curriculum, because, as you know, "the first impression is a lasting one."

When you are introducing the retailing curriculum, be:

Creative.

--Have former students who are employed in retailing occupations discuss with your students how they were helped by taking Marketing and Distributive Education.
--Have local store owner/managers discuss the knowledges and skills needed by their employees, and then compare what they say to what the students will be learning.
--Have students interview retail salespeople, stock clerks, and receiving clerks to find out what knowledges they need and the tasks they perform on the job. Then have them compare what these people do with the retailing curriculum.
--Show slides (self-made) of local salespeople, receiving clerks, and stock clerks performing on-the-job tasks, and compare these activities to the curriculum.

A Salesperson.

--Plan your presentation of the curriculum to be interesting, exciting, and benefifical to the customers (your students).
--Highlight the hands-on-activities of the curriculum, i.e., show card lettering, display construction, and sales presentations

Well-Organized.

--Have equipment, references, and resources in locations where you can easily show students how they will be using them.
--Give students an outline of the curriculum to read about the knowledges and skills they will be learning.

Able to Discuss and Demonstrate.

--Discuss and demonstration each task in the curriculum.
--Tell about each piece of equipment.

Willing to be In-Serviced.

--Learn tasks that you are unable to perform in the curriculum.
--Learn how to operate retailing and classroom (laboratory) equipment.

Enthusiastic.

--Present the retailing curriculum with a degree of "gusto" that will create a student desire to "get started."

Helpful.

--Assist students who may have learning difficulties.
--Be willing to listen to your students, and be prepared to answer their questions concerning the retailing curriulum.

Informative about Youth-Related Activities.

Prepare to discuss and illustrate how DECA helps students learn retailing knowledges and skills; i.e., competitive based events, leadership roles, and group and individual events.

INTRODUCTION TO THE RETAILING CURRICULUM

FRAME 1

Title Slide.

FRAME 2

You have enrolled in a vocational education program called "Retailing", a training program with the primary objective of helping you learn how to perform the skills of three "Retailing" occupations:

-Receiving clerk

-Stock clerk and

-Retail salesperson

This slide-tape presentation is designed to introduce you to the skills that you will be learning, how you will learn these skills, and what you can expect from enrolling in this vocational education program.

As you view this presentation, watch it with the understanding that "Retailing" is an occupational area that has the primary objective of serving people by offering them products and services that will satisfy their needs and wants.

FRAME 3

Retailing is many people working together in many different kinds of stores

FRAME 4

No narrative.

FRAME 5

No narrative.

FRAME 6

and of course many others such as variety stores, clothing and department stores.

FRAME 7

Retailing is many people working in many different kinds of jobs such as

-order clerks

FRAME 8

RECEIVING CLERKS

FRAME 9

No narrative.

FRAME 10

STOCK CLERKS

FRAME 11

CHECKERS

FRAME 12

PRICE MARKERS

FRAME 13

No narrative.

FRAME 14

CASHIERS

FRAME 15

SALESPEOPLE

FRAME 16

No narrative.

FRAME 17

AND MANAGERS

FRAME 18

No narrative.

FRAME 19

Retailing is people performing specific tasks so the merchandise needs of consumers can be satisfied. Some of these people and tasks include:

-Order clerks who write requisitions for merchandise.

FRAME 20

Receiving clerks who unload, check and store merchandise until it is needed by the consumers.

FRAME 21

Checkers who open containers and examine the quality of and count the number of items received.

FRAME 22

Price markers who attach price tags to the merchandise,

FRAME 23

stock clerks who display the merchandise in the retail store for the customers to see and purchase, and

FRAME 24

salespeople who help the customers by showing them how the merchandise may be used, maintained, coordinated and guaranteed to satisfy their needs.

FRAME 25

In this "RETAILING" program you will be learning how to perform many of these tasks and numerous others, for example you will learn how to:

- Prepare purchase orders and other documents that are needed to maintain good communication in "Retailing" and how to

FRAME 26

telephone purchase orders to vendors,

FRAME 27

receive shipments of merchandise,

FRAME 28

how to store merchandise,

FRAME 29

how to assist in taking physical inventory,

FRAME 30

how to price mark merchandise,

FRAME 31

how to write copy for and design show cards and signs,

FRAME 32

how to stock merchandise on the sales floor,

FRAME 33

how to set up displays,

FRAME 34

No narrative.

FRAME 35

how to operate a cash register, and

FRAME 36

how to sell merchandise and numerous other skills.

FRAME 37

You will also learn the skills of how to prepare for and to apply for employment.

FRAME 38

You will be learning these skills by:

-Participating in large and small group discussions,

FRAME 39

observing demonstrations performed by teachers and others,

FRAME 40

by participating in one on one discussions with your teacher,

FRAME 41

reading reference materials,

FRAME 42

viewing slide-tape presentations and

FRAME 43

by practicing them in your classroom laboratory area.

FRAME 44

As you learn how to perform each Retailing task you will know how well you can do it because your teacher will give you a check-out activity to perform which will be designed to demonstrate if you can in fact do the task. If you demonstrate that you need additional practice, your teacher will provide more practice exercises.

FRAME 45

Retailing has a need for people who are knowledgeable, people who are skilled in performing the specific tasks that are performed in the retail stores. It has been forecasted that the job openings in Retailing will be among the top five occupational needs for the next ten years.

As you begin this Retailing program, study diligently. Thoroughly practice and learn skills of the occupations. You will be rewarded through job and personal satisfaction.

FRAME 46

The End.

STUDENT SELF-CHECK I

THE RETAILING CURRICULUM

ANSWERS

1. a. Receiving clerk (retail)
   b. Stock clerk (retail)
   c. Retail salesperson

2. Answers will vary.

3. a. Teacher-led discussions
   b. Large- and small-group discussions and practice.
   c. Individual practice.
   d. Audio-visual materials.

4. (2) Stock clerks
   (4) Receiving clerks

5. a. Receiving clerk - primary responsibility is to unload, check in, and store merchandise and perform other tasks related to receiving merchandise.
   b. Salesperson - one whose primary responsibility is to perform selling activities, i.e. assist customers , make merchandise selections, accept customers payments, etc.
   c. Stock clerk - one whose primary responsibility is to perform tasks to related to stocking merchandise in retail store, i.e. price marking, shelving, displaying etc.

6. Answers will vary.

CHECK-OUT ACTIVITY SHEET

INTRODUCTION TO THE RETAILING CURRICULUM

Directions: Your instructor has described to you the retailing curriculum in which you have elected to enroll. The following questions are designed to check your knowledge about this curriculum. Answer each question. When you are finished, discuss your answers with your instructor.

1. The retailing curriculum is designed to help you learn the knowledges and skills of three occupations. The three occupations are:

   a. ______________________________
   b. ______________________________
   c. ______________________________

2. You will learn the retailing knowledges and skills by reading about them. What other ways will be used to help you learn about them and how to perform them?

   a. ______________________________
   b. ______________________________
   c. ______________________________

3. You have learned that there are specific tasks that persons must be able to perform if they are to successfully work in a specific occupation. In the space below, list at least five (5) tasks which you will be learning for each of the three retailing occupations.

   a. ______________________________ (Job Title)

      (1) ______________________________ Task
      (2) ______________________________ Task
      (3) ______________________________ Task
      (4) ______________________________ Task
      (5) ______________________________ Task

   b. ______________________________ (Job Title)

      (1) ______________________________ Task
      (2) ______________________________ Task
      (3) ______________________________ Task
      (4) ______________________________ Task
      (5) ______________________________ Task

   c. ______________________________ (Job Title)

      (1) ______________________________ Task
      (2) ______________________________ Task
      (3) ______________________________ Task
      (4) ______________________________ Task
      (5) ______________________________ Task

CHECK-OUT ACTIVITY SHEET, (page 2)

4. I have elected to enroll in the retailing vocational education program because: (Briefly describe why you think this vocational program will benefit you.)

5. I am interested in learning how to perform the tasks of _____, _____, and _____ occupations.

6. Check one of the following statements that expresses your understanding of the retailing curriculum.

_____ a. I fully understand the retailing curriculum.
_____ b. I need to ask some questions about what I will be learning in this vocational education program.

CHECK-OUT ACTIVITY SHEET

INTRODUCTION TO THE RETAILING CURRICULUM

ANSWERS

1. a. Receiving clerk (retail)
   b. Stock clerk (retail)
   c. Retail salesperson

2. a. Teacher-led discussions
   b. Large- and small-group discussion and practice
   c. Individual practice
   d. Audio-visual materials

3. Answers will vary.

4. Answers will vary.

5. Answers will vary. This part of the test will not be graded.

6. Answers will vary.

DECA

OBJECTIVE

Given ten questions concerning DECA, answer the questions without error.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that being a member of DECA will help them in learning the specific skills of leadership, working with others, competition, and many of the social skills.
--The students will realize that being a member of DECA will help them learn many of the tasks needed by people employed in retailing occupations.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I DECA	3
Student Self-Check	
I DECA	4
Instructor's Final Checklist	
DECA	5

CHECK-OUT ACTIVITY

Your instructor will give you a test concerning DECA. Answer each of the questions.

Check-Out Activity Sheet	
DECA	5
ANSWER KEY	5

DECA

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss in large group, DECA. Emphasize: --how DECA will benefit student members. --three purposes of DECA. --how DECA will help students learn retailing skills. --DECA competitive events. --the organization of DECA chapter.	--Brochures explaining DECA --Leader's Guide --Competitive Events Guide (Handbook) --DECA products catalog --Handbook for DECA sponsors These references can be obtained from: National DECA, 1908 Association Drive, Reston, Virginia 22091	
2	Explain the objective of the film before showing to students in large group. Film objective: --Overview of what DECA is about. --Highlights of competitive events. --Employee-Employer Banquet etc.	Film 16 mm: "DECA is for Everyone" (The film can be obtained from National DECA.)	
3		Instruction Sheet I, DECA	
4	Student Self-Check I	--An Answer Key is provided in this section of the manual	
5	Organize a local chapter of DECA. Student Self-Check I	--Chapter Management Aids Handbook --Handbook can be obtained from National DECA --An Answer Key is provided in this section of the manual	
6	The test concerning DECA is to be used as the final Check-Out Activity. You may wish to add more questions to this activity.	--Copies of the Check-Out Activity, DECA (A Master Copy and Answer key are provided in this section of the manual.)	

DECA

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

DECA

ANSWERS

1. c
2. c
3. e
4. d
5. c
6. b
7. e
8. a
9. c
10. c

CHECK-OUT ACTIVITY SHEET

DECA

Directions: Circle the letters of the correct answers.

1. To be a member of DECA, a student must be:

   a. A junior in high school.
   b. 16 years of age.
   c. Enrolled in Marketing and Distributive Education.
   d. Planning to attend college.

2. DECA is _____ for Distributive Education Clubs of America.

   a. Hononym
   b. Synonym
   c. Acronym
   d. Antonym

3. DECA gives students opportunities to gain knowledge in:

   a. Civic understanding.
   b. Vocational understanding.
   c. Social intelligence.
   d. Leadership ability.
   e. All of the above.
   f. None of the above.

4. The person who serves as the Advisor for the local DECA chapter is the:

   a. Guidance Counselor.
   b. Principal.
   c. Business Education Teacher.
   d. None of the above.
   e. All of the above

5. Helping with a Muscular Dystrophy drive is an example of:

   a. Leadership ability.
   b. Social intelligence.
   c. Civic consciousness.
   d. Vocational understanding.

6. Your state organization is:

   a. A chapter.
   b. An association.
   c. A club.
   d. All of the above.
   e. None of the above.

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CHECK-OUT ACTIVITY SHEET, (page 2)

7. A student with vocational understanding should be able to demonstrate that he/she understands:

   a. What the employer expects.
   b. That a high school diploma is necessary to work in marketing occupations.
   c. How the company can benefit from his/her services.
   d. Both a and c.
   e. Both b and d.

8. Your local organization is a _____ of the Distributive Education Clubs of America.

   a. Chapter
   b. Club
   c. Association

9. Your national organization publishes _____ to keep you informed of DECA activities.

   a. Newsletters
   b. Handbooks
   c. Both a and b

10. DECA is _____ activity.

    a. A curricular
    b. An extra-curricular
    c. Co-curricular

CHECK-OUT ACTIVITY SHEET

DECA

ANSWERS

1. c
2. c
3. e
4. d
5. c
6. b
7. e
8. a
9. c
10. c

ORDERING MERCHANDISE

OBJECTIVE

Given a department requisition form, a purchase order blank, and catalogs from suppliers (vendors), prepare a purchase order for merchandise. The purchase order should be written legibly, and all information needed for ordering the merchandise should be included.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that business forms are one of the important methods of business communication. To serve this purpose they must be written accurately and legibly.

--The students will realize that the process of retailing begins with the task of ordering merchandise.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I THE PURCHASE REQUISITION AND THE PURCHASE ORDER...	4
Student Self-Checks	
I PREPARING PURCHASE ORDERS FOR MERCHANDISE........	3
II WRITING PURCHASE ORDERS..........................	5
Instructor's Final Checklist	
ORDERING MERCHANDISE................................	6

CHECK-OUT ACTIVITY

Your instructor will provide a department requisition for merchandise, a supplier's catalog, and a purchase order form. Prepare the purchase order.

Check-Out Activity Sheet	
ORDERING MERCHANDISE................................	6

RECOMMENDED REFERENCE

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, 2nd Edition, Gregg/McGraw-Hill Book Company, St. Louis, 1980.

ORDERING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCE Moffett and Hawkins, The Receiving, Checking, Marking, Stocking Clerk, pp. 7-15.	
2	Discuss and demonstrate in large or small groups how to order merchandise from vendors. Emphasize: --Accuracy and legibility. --Complete information on "Purchase Order." You may make transparency master of purchase order for use on overhead projector.	--Overhead projector --Transparency film --Purchase order forms --Vendor's catalog (can be obtained from local merchants or from vendors.) SUGGESTED AV MATERIAL Filmstrip/cassette: Requisitions and Purchase Orders, Singer	
3	Assist the students with Student Self-Check I.	--Copies of the PURCHASE ORDER form. (A Master Copy is provided in this section of the manual.) --An answer key is included in this section of the manual.	
4	Prepare examples of department requisitions for merchandise. Have students complete a purchase order by using catalogs of vendors. Assist the students as they write purchase orders. Demonstrate how to use the vendor catalogs.	--Vendors' catalogs --Copies of PURCHASE ORDER and PURCHASE REQUISITION FORM. (A Master Copy of each is provided in this manual.)	

ORDERING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Prepare examples of department requisitions for merchandise.	--Vendors' catalogs --Purchase order forms --Department requisitions	
	Have vendor catalogs on hand for check-out activity. Have purchase order forms on hand.		
	Use Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

PREPARING PURCHASE ORDERS FOR MERCHANDISE

ANSWERS

1. d.

2. a.

3. a.
   b.
   c.

4. a.

5. a.
   b.
   c.
   d.
   e.
   f.

6. a.
   b.
   c.
   d.
   e.
   f.
   g.
   h.
   i.
   j.
   k.
   l.

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CHECK-OUT ACTIVITY SHEET

ORDERING MERCHANDISE

Directions: Your instructor will provide you a department requisition for merchandise, a purchase order and vendors catalog. Complete the purchase order form.

CHECK-OUT ACTIVITY SHEET, (page 2)

PURCHASE REQUISITION ORIGINAL

FROM ______________ DEPT. ____________________ DATE ____________

DATE NEEDED ______________ FOR ORDER NO. ____________ REPLACEMENT EQUIPMENT

QUANTITY	DESCRIPTION

Requisition must be approved by Manager before purchase is made.

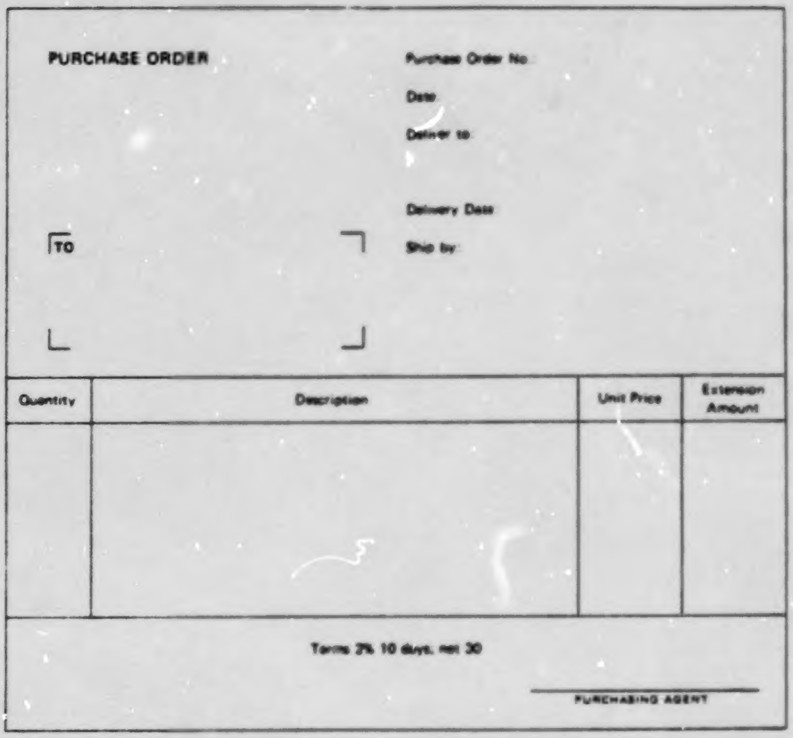
APPROVED ______________________________ SIGNED ____________________

PURCHASE ORDER NO. ____

ORDERED FROM ____

CHECK-OUT ACTIVITY SHEET

ORDERING MERCHANDISE



PURCHASE ORDER

Purchase Order No.:

Date:

Deliver to:

Delivery Date:

TO

Ship by:

Quantity	Description	Unit Price	Extension Amount

Terms 2% 10 days, net 30

PURCHASING AGENT

Instructor's Guide Sheet Module R-6

TELEPHONING ORDERS TO WHOLESALERS

OBJECTIVE

Given a store order for merchandise that is to be called to a wholesaler and access to a telephone, call the wholesaler and place the order. All applicable criteria on the Instructor's Final Checklist should be acceptably completed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that the telephone is, when properly used, a valuable tool for the retailer.
--Students will realize that clear, concise, and accurate information must be used when placing orders for merchandise.
--Students will realize that the retailer must always have merchandise on hand to serve the needs of customers.
--Students will realize the importance of the wholesaler's role in distribution.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I THE WHOLESALER....................................	1
II TELEPHONING AN ORDER TO THE WHOLESALER...........	2

Student Self-Check	
I CALLING ORDERS TO WHOLESALERS.....................	4

Instructor's Final Checklist	
TELEPHONING ORDERS TO WHOLESALERS...................	5

CHECK-OUT ACTIVITY

Your instructor will give you an order of merchandise that is to be telephoned to a wholesaler. Order the merchandise.

TELEPHONING ORDERS TO WHOLESALERS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Supplement the reading with a discussion on "The Role of the Wholesaler in the Distribution Process."	SUGGESTED AV MATERIAL Singer, "Telephone Procedures," filmstrip and cassette.	
2-3	Supplement the reading and talk with a discussion on "The Proper Use of the Business Telephone." Teletrainers can be acquired from you local telephone company. Films showing proper business telephone use are available. Brochures and books concerning how to properly use the telephone in business are also available. Advance schedule teletrainer and films. Demonstrate the use of the teletrainer.		
4	Set up the teletrainer in laboratory. Have students evaluate their practice sessions. Have the class evaluate each student is the recorder is not available.	--Cassette recorder and tape for recording students' telephone practice sessions.	
5	Write a merchandise order to use for the Check-Out Activity. Have another student role play wholesaler's order clerk while you observe the Check-Out Activities.	--Teletrainer --Sample order of merchandise	

TELEPHONING ORDERS TO WHOLESALERS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

PROCESSING CUSTOMERS' SPECIAL ORDERS

OBJECTIVE

Provided a customer who wishes to make a special order and a special order form, process the customer's special order. All required information must be included on the order form.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that by special ordering merchandise for customers they can provide a service that will greatly help in creating a good store image.

--The students will realize that special ordering is only one of many services that they can offer their store's customers.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I PROCESSING CUSTOMERS' SPECIAL ORDERS	1

Instructor's Final Checklist	
PROCESSING CUSTOMERS' SPECIAL ORDERS	4

CHECK-OUT ACTIVITY

Your instructor will provide a customer who desires to special order merchandise. Special order the merchandise

Check-Out Activity Sheet	
CASE PROBLEM	4

PROCESSING CUSTOMERS SPECIAL ORDERS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, PROCESSING CUSTOMERS' SPECIAL ORDERS	
2	Discuss and demonstrate in large or small groups how to process customers' special orders. Make a transparency of a special order form for overhead projection.	--Copies of the Special Order Form. (A Master Copy is enclosed in this section.) --Transparency film --Overhead projector	
3	Assist students as they practice writing special orders. Check their practice exercises. Design additional case problems.	--Copies of the Practice Case Problem (A Master Copy is provided in this section of the manual.)	
4		--Copies of the Special Order Form. (A Master Copy is enclosed in this section.) --Role player (customer) --Copies of the Check-Out Activity Sheet. (A Master Copy is enclosed in this section.)	
	Use the Instructor's Final Checklist to evaluate each student's performance. Design a case problem that involves "special ordering" merchandise.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

Case Problem

PROCESSING CUSTOMER'S SPECIAL ORDERS

You are a salesperson at XY Department Store, 1311 West Main Street, Anytown, Kentucky. A customer approaches you and says, "I have looked and looked for a Victory remote control 21-inch table model color television in your floor models and can't find one. You do have the Victory brand, but because of my limited space I need a 21-inch model. Can you help me? You suggest a console, but your customer insists on a table model. Your store does have a special order service for its customers. Process the customer's special order. Your customer's name is Alice G. Doe, 111 North High Street, Anytown, Kentucky. The cost of model number CTV 4813 is $439.59. The 5 percent sales tax is applicable. Your store requires that the customer pay a 15 percent down payment for special orders.

Process the special order. Use the special order form given to you by your instructor.

SPECIAL ORDER FORM

SOLD TO

SHIP TO

PHONE NO.

No. 00000

XC

X-Company
13 West Street
Anytown, Kentucky 00000

Special Order ☐ C.O.D. ☐ Will Call ☐
Stock Order ☐ Phone ☐ Other ____________

Date	Customer	Order No.	Salesman	Ship Via	Ups	O.T.	Filled By	No. of Pack	B.O. From

QUANTITY				S.L.	DESCRIPTION	UNIT PRICE	TOTAL
Order	Ship	Unit					
A DEPOSIT OF APPROX. ½ IS REQUIRED ON ALL SPECIAL ORDERS UNLESS TO BE CHARGED AND DELIVERED.						Tax	
						Total	

CHECK-OUT ACTIVITY SHEET

CASE PROBLEM

You are a salesperson at the X Company Department Store. A customer approaches and says, "I can not find the 13 inch View-A-Vision color television that I have seen advertised on television. I know it's a new model. Can you order it for me." Your store does carry the View-A-Vision television sets and it does offer its customers a special ordering service. The address of View-A-Vision is 1909 Technic road, Pamonia Ohio, 00000. Your stores policy is to require the customer to pay one-half of the total purchase price of special ordered merchandise. The cost of the 13 inch model 505 color television set is $250. Write the special order. Ask your instructor for a blank special order form.

SOLD TO

SHIP TO

PHONE NO.

No. 00000

X-Company
13 West Street
Anytown, Kentucky 00000

Special Order ☐ C.O.D. ☐ Will Call ☐
Stock Order ☐ Phone ☐ Other ____________

Date	Customer	Order No.	Salesman	Ship Via	Ups	O.T.	Filled By	No. of Pack	B.O. From

QUANTITY							
Order	Ship	Unit		S.L.	DESCRIPTION	UNIT PRICE	TOTAL

A DEPOSIT OF APPROX. ½ IS REQUIRED ON ALL SPECIAL ORDERS UNLESS TO BE CHARGED AND DELIVERED.

Tax

Total

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

OBJECTIVES

(1) Given a variety of case problems, list the correct safety procedures to be performed in each situation. Each case problem must be solved with 90% accuracy.

(2) Provided a load of merchandise, safely lift, carry, and put down the load. All items on the Instructor's Final Checklist must be performed without error.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize the importance of safely using tools and equipment that are in good condition.
--Students will realize the importance of taking precautions when lifting, carrying, and putting down a load.
--Students will realize that safety is an on-going activity.

CONTENTS OF MODULE

Instruction Sheets — Learning Activity Number

I. IMPORTANCE OF SAFETY 1
II. SAFETY AND MAINTENANCE PROCEDURES FOR USING RECEIVING EQUIPMENT 2
III. ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES 5
IV. SAFELY LIFT, CARRY, AND PUT DOWN A LOAD 7

Student Self-Checks

I. SAFETY PROCEDURES FOR RECEIVING EQUIPMENT 4
II. ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES 6
III. SAFELY LIFT, CARRY, AND PUT DOWN A LOAD 9

Instructor's Final Checklist

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE 11

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with six case problems. List the correct safety procedures performed in each situation.

(2) Your instructor will provide you with a load of merchandise. Safely lift, carry, and put down the load.

RECOMMENDED REFERENCES AND RESOURCES:

Moffett, Carol Willis and O. Rebecca Hawkins, The Receiving, Checking, Marking, Stocking Clerk, 2nd ed., McGraw-Hill Book Company, 1980.

Ritch, Kelly, Receiving, Checking, and Marking, Instructional Materials Laboratory, The University of Texas at Austin, 1969.

OSHA catalog of *materials. Kentucky OSHA Program, Department of Labor, US 127 South, Frankfort, KY.

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss in large group the importance of practicing safe work habits in retailing occupations. Emphasize: --Prevention of customer accidents. --Prevention of self and injury. --Prevention of damage to merchandise. --Prevention of losing work hours. Discuss: --Specific safety rules for warehousing area. --Specific safety rules for retail sales area. Emphasize: --Safety procedures that must be followed when learning and performing each retailing task. Arrange to take students on a "safety" field trip to a local retailing establishment. Request that store manager/owner and warehouse personnel discuss retailing safety with students.	SUGGESTED REFERENCES NIOSH: Health and Safety Guide for Sporting Goods Stores. OSHA: Handbook For Small Businesses. OSHA: Safety and Health Training Guidelines. NIOSH: Health and Safety Guide for Auto and Home Supply Stores. Luter, Basic Visual Merchandising, "Safety and Security in Visual Merchandising." Luter, Physical Distribution, "Safety In Handling Merchandise." Moffett and Hawkins, The Receiving, Checking Marking, Stocking Clerk, "Safety." Hatchett, Warehousing, "Warehouse Safety."	
2		Instruction Sheet I, IMPORTANCE OF SAFETY	
3		Instruction Sheet II, SAFETY AND MAINTENANCE PROCEDURES FOR USING RECEIVING EQUIPMENT	

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4		Student Self-Check I, SAFETY PROCEDURES FOR RECEIVING EQUIPMENT --An answer key is provided in this section of the manual.	
5	--Have students design posters - "Safety In Retailing" --Have students design accident prevention campaigns for retailing	Instruction Sheet III, ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES	
6		Student Self-Check II, ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES --An answer key is provided in this section of the manual.	
7		Instruction Sheet IV, SAFELY LIFT, CARRY, AND PUT DOWN A LOAD	
8	Discuss and demonstrate for students how to safely lift, carry out, and put down loads. Emphasize: --Prevention of back strain. --Avoidance of carrying loads that are too heavy for one person.		
9	Video-tape students practice sessions. Show them where they need to improve.	Student Self-Check IV, SAFELY LIFT, CARRY AND AND PUT DOWN LOADS --An answer key is provided in this section of this manual.	

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
10	Assemble materials for students to practice lifting, carrying, and putting down a load of merchandise. Closely supervise this practice session: --Determine that each student has knowledge of how to properly lift, carry, and put-down loads before they begin practice session. --Ask each student to describe how they are going to perform this task before they begin to practice.	--Containers	
11	Use Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. --Containers for students to lift, carry, and put down.	

CHECK-OUT ACTIVITY #1

SAFETY IN RETAILING

Directions: On a separate sheet of paper, answer each of the following case problems concerning practicing safety in the retail warehouse and store.

Case Problem #1:

You are a receiving clerk in a retailer's receiving area and your supervisor has asked you to get a two-wheeled hand truck (dolly) and unload an eighteen wheeler that has just arrived with an order of merchandise. List ten safety procedures that you will follow as you unload the truck with the two wheel dolly.

Case Problem #2:

As an employee of a retail establishment there are numerous fire prevention and fire safety procedures that you should practice. List eight of these procedures.

Case Problem #3:

Your store manager has asked that you discuss with a new employee the safety rules that are practiced in the retail sales area. Write at least twelve of the rules that you would discuss.

Case Problem #4:

Receiving clerks must practice acceptable safety procedures as they perform their daily tasks of receiving and storing merchandise. List 15 of the safety procedures that you would practice as a receiving clerk.

Case Problem #5:

Every retail establishemnt will have acceptable housekeeping activities that are performed to maintain a good apperarance and to maintain a safe environment for workers and customers. List ten of these safe housekeeping activities that you will perform as an employee of a retail establishment.

Case Problem #6:

Receiving clerks operate numerous kinds of equipment in performing their daily tasks. To avoid self and associate injury accidents there are safety procedures that must be followed. List eight of these safty rules.

STUDENT SELF-CHECK I

IMPORTANCE OF SAFETY PROCEDURES FOR RECEIVING EQUIPMENT

ANSWER KEY

1. F
2. T
3. T
4. F
5. F
6. T
7. T
8. T
9. F
10. T

STUDENT SELF-CHECK II

ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES

ANSWER KEY

1. T
2. F
3. T
4. T
5. F
6. F
7. T
8. F
9. T
10. T
11. T
12. T
13. F
14. T
15. T
16. F
17. F
18. T
19. T
20. T
21. T
22. F
23. T
24. T
25. T

STUDENT SELF-CHECK III

SAFELY LIFT, CARRY, AND PUT DOWN A LOAD

ANSWER KEY

Lifting: 2, 4, 6, 8, 10, 11, 9, 7, 5, 3, 1

Carrying: 4, 3, 2, 1

Putting Down A Load: 1, 4, 2, 6, 5, 3

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

OBJECTIVE

Given two case problems involving customer or store employee accidents, write the procedures that you, as a witnessing or first-on-the-scene employee would follow in handling the accidents. Each written description should contain the applicable steps that are listed on the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

- Students will realize that accident prevention is foremost in importance, however, they will also realize that their immediate action, when witnessing an accident, can help the victims.
- Students will realize that when they take correct action, when witnessing an accident, many future problems can be eliminated.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I SAFETY FIRST PREVENTS ACCIDENTS LATER	1
II IF AN ACCIDENT OCCURS	2
Student Self-Check	
I SAFETY FIRST BEFORE ACCIDENTS	4
Instructor's Final Checklist	
HANDLING EMPLOYEE/CUSTOMER ACCIDENTS	5

CHECK-OUT ACTIVITY

Your instructor will give you two case situations involving store accidents. Describe in writing how you would handle each case.

Check-Out Activity Sheet	
HANDLING EMPLOYEE/CUSTOMER ACCIDENTS	5
ANSWER KEY	5

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, SAFETY FIRST PREVENTS ACCIDENTS LATER	
2		Instruction Sheet II, IF AN ACCIDENT OCCURS	
3	Discuss or invite a store manager/owner to discuss "What Employees Should do if There is a Customer Accident."	OSHA has brochures and booklets concerning store safety at a nominal cost. 1375 Peachtree Street N.E. Suite 587 Atlanta, Georgia 30367	
4		Student Self-Check I, SAFETY FIRST BEFORE ACCIDENTS --An answer key is provided in this section of the manual.	
5	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

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STUDENT SELF-CHECK I

SAFETY FIRST BEFORE ACCIDENTS

POSSIBLE ANSWERS

1. Safety Rules

   a. Keep customer traffic aisle clear by removing packing, wrapping paper, shopping carts, and stocking and cleaning equipment.

   b. Do not construct displays in customer traffic aisles.

   c. Avoid stocking merchandise where it will be knocked down by normal customer traffic.

   d. Maintain a sufficient amount of space in aisles for normal customer traffic.

   e. Inspect aisles periodically to determine that they are clear.

   f. Stack merchandise so that it will not easily fall if bumped.

   g. Keep warehouse and retail store floors clean by:

   --Sweeping up paper, cigarette butts, and all other trash.
   --Dry mopping to remove dust.

   h. Keep floors in warehouse and retail store dry by:

   --Mopping up tracked-in water.
   --Replacing wet mats with dry ones.
   --Mopping up any water that accumulates around displays.
   --Washing and waxing floors before or after store hours.

   i. Immediately sweep up broken glass, using a brush and dust pan instead of fingers. Clean up sticky or dusty products that were in glass containers

   j. Use ladders for climbing. Do not use shelves or boxes.

2. Lifting

   a. Use equipment that is designed for the load.

   b. Use moving equipment to save wear and tear on the back.

   c. Ask for help if the item is to heavy to move by yourself.

STUDENT SELF-CHECK I, (page 2)

3. Preventing Cuts

   a. Open containers with tools designed for the purpose.

   b. Place tools in designated storage areas.

   c. Keep cutting tools sharp.

   d. Always cut away from your body.

4. If an Accident Occurs

   a. Follow store policies.

   b. Immediately call for assistance for the victim: store manager, nurse, store employee trained in first-aid.

   c. Comfort the accident victim until trained assistance arrives, if requested.

   d. Follow store policy in writing a report of the accident.

CHECK-OUT ACTIVITY SHEET

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

Situation 1. Susan Gray, cashier for Young's Grocery, was checking out a customer. As she started to close the cash drawer, she caught her little finger inside the cash drawer. The finger was badly bruised and swollen. Connie Johnson, cashier in the next lane, observed the accident. How should the accident be handled?

Situation 2. As Leslie Williams was walking down an aisle at Jay Jay's Boutique, she fell and hit her head on a display rack. When Joyce Jones, an employee, reached Miss Williams, she was unconscious. How should Joyce handle this situation?

CHECK-OUT ACTIVITY SHEET

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

ANSWERS

Case Situation 1:

a. Follow store policy

b. Get medical attention promptly.

c. Obtain eye-witness report.

d. Fill out the proper accident forms

Case Situation 2:

a. Follow store policy.

b. Summon aid quickly (i.e., upervisor, nurse, doctor, store employee trained as first-aid attendant).

c. Keep customer as comfortable as possible.

d. Keep store traffic directed away from victim.

e. Get eye-witness testimonies.

f. If requested, fill out proper report forms.

RECEIVING SHIPMENTS OF MERCHANDISE

OBJECTIVE

Provided an incoming shipment of merchandise, unloading equipment, an invoice register, a shipping invoice (bill of lading), a purchase order a discrepancy report form, and marking tools, receive the shipment of merchandise. The merchandise should be safely off-loaded without damage; each carton should be checked against the shipping invoice (bill of lading) and the purchase order; and each discrepancy should be noted. The shipment should be registered in the invoice register and the cartons should be marked with the store's receiving identification code.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that the receiving activities are important to the total store operation.
--Students will realize that they must follow store procedures when receiving merchandise.
--Students will realize that if they practice correct receiving procedures when on-the-job that store losses in the receiving area will be minimal.

CONTENTS OF MODULE

Instruction Sheets		Learning Activity Number
I	RECEIVING MERCHANDISE: A SUMMARY OF ACTIVITIES	2
II	THE RECEIVING RECORD	5
III	RECORDING INVOICES IN THE INVOICE REGISTER	7
IV	CHECKING INVOICES WITH PURCHASE ORDERS	10

Student Self-Checks		
I	RECEIVING SHIPMENTS OF MERCHANDISE	3
II	THE RECEIVING RECORD	6
III	RECORDING INVOICES IN THE INVOICE REGISTER	8
IV	CHECKING INVOICES WITH PURCHASE ORDERS	11

Instructor's Final Checklist	
RECEIVING SHIPMENTS OF MERCHANDISE	14

CHECK-OUT ACTIVITY

Your instructor will provide you with a shipment of merchandise, shipping documents, receiving forms, marking tooks, and a purchase order. Receive the shipment of merchandise.

RECEIVING SHIPMENTS OF MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	A field trip to a retailer's receiving area will be very helpful in giving students a perspective of what activities do happen when merchandise is received.	Moffett and Hawkins, The Receiving Checking, Marking, Stocking Clerk, "Being A Receiver." Luter, Physical Distribution, "The Receiving Operation," "Methods of Checking and Classifying Merchandise." Samson, Little, Wingate, Retail Merchandising, "Receiving and Checking Goods." Richert, Meyer, Haines, Harris, Retailing Principles and Practices, "Receiving and Checking."	
2		Student Self-Check I, RECEIVING SHIPMENTS OF MERCHANDISE --An Answer Key is provided in this section of the manual.	
3		Instruction Sheet I, A SUMMARY OF RECEIVING ACTIVITIES	
4	Discuss with and show students how merchandise is received in retail receiving areas. Slide/tape presentation R-10, "Receiving Checking and Price Marking" may be used to illustrate this task. Emphasize: --Safety when unloading --Equipment used for off-loading --Forms used during receiving	--Slide-tape presentation R-10, "Receiving, Checking, and Price Marking --Slide-tape presentation OR --Filmstrip/Cassette Singer, "Receiving Merchandise" --Filmstrip projector with cassette tape player	

RECEIVING SHIPMENTS OF MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	--Shipping invoice --Bill of lading --Discrepancy report forms --Invoice register --Marking cartons with identification codes --Checking cartons for visible damage --Checking cout of cartons with bill of lading and/or shipping invoice --Documenting discrepancies You may wish to make transparencies of forms to show students how to complete.		
5		Instruction Sheet II, THE RECEIVING RECORD	
6		Student Self-Check II, THE RECEIVING RECORD --An Answer Key is provided in this section of the manual	
7		Instruction Sheet III, RECORDING INVOICES IN THE INVOICE RECORD	
8		Student Self-Check III, RECORDING INVOICES IN THE INVOICE REGISTER --An Answer Key is provided in this section of the manual	
9			
10		Instruction Sheet IV, CHECKING INVOICES WITH PURCHASE ORDERS	

RECEIVING SHIPMENTS OF MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
11		Student Self-Check IV, CHECKING INVOICES WITH PURCHASE ORDERS --An Answer Key is provided in this section of the manual.	
12	Use the Instructor's Final Checklist to evaluate student's performance. Set up the receiving area for the students with: --Merchandise in cartons, --Shipping invoices --Receiving record, --Discrepancy report, --Purchase order, --Receiving tools and equipment --Marking tools.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.) Receiving area can be: --Cafeteria --School supplies etc.	

STUDENT SELF-CHECK I

RECEIVING SHIPMENTS OF MERCHANDISE

ANSWERS

1. b. dock

2. a.
   b.
   c.
   d.
   e.
   f.
   g.
   h.

THE RECEIVING, CHECKING, MARKING AND STOCKING PROCESS

FRAME 1

Title slide.

FRAME 2

The following slide-tape presentation is designed to give you an overview of the activities that are performed by receiving clerks, checkers, price markers, and stock clerks as they receive, check, price mark and stock merchandise in retail establishments. Each of these activities is very important and each must be performed efficiently and accurately if the retailer is to accomplish the goal of satisfying consumer's needs for services and products.

FRAME 3

"I have a truck with merchandise at your receiving dock." "Thank you, we will unload it without delay."

FRAME 4

With these statements or simiiliar ones, the receiving process begins.

FRAME 5

A lighting system is used to provide illumination during the unloading activities.

FRAME 6

The unloading bridge is put in place to join the truck safely to the unloading dock.

FRAME 7

Roller conveyors are used by some receiving departments to aid in unloading the merchandise. Other aids include dollies, mechanical and motorized fork lifts.

FRAME 8

Each container is checked with the shipping invoice to determine that all are included in the shipment. Any discrepancy is noted on the shipping documents and reported to the supervisor of the receiving department.

FRAME 9

Unloading by hand may be necessary.

FRAME 10

Containers, if they are not to be placed in storage, are taken or

FRAME 11

routed to the checkers

FRAME 12

who open them and

FRAME 13

check the contents to determine that the items are not damaged,

FRAME 14

and that they are included in the shipment.

FRAME 15

The checker sends the merchandise on to the price marker

FRAME 16

who prepares price tags for each item and

FRAME 17

attaches the tag to the merchandise.

FRAME 18

The merchandise is then placed on material movers

FRAME 19

so that it can be easily transported to the retail department where it will be placed on display for customers to purchase.

FRAME 20

The End.

STUDENT SELF-CHECK II

THE RECEIVING RECORD

ANSWERS

Check each student's answers to determine whether or not the receiving record was completed accurately.

STUDENT SELF-CHECK III

RECORDING INVOICES IN THE INVOICE REGISTER

ANSWERS

1. a, b
2. a, b, c, d, e, f
3. a, b, c

STUDENT SELF-CHECK IV

CHECKING INVOICES WITH PURCHASE ORDERS

ANSWERS

The following discrepancies are in the example:

a. Men's watches are $10 per watch more than purchase order.

2. Total of purchase order and invoice do not agree.

3. The invoice shows charges for a display of watch bands. It indicates that the display was not shipped.

OPENING CONTAINERS

OBJECTIVE

Given opening tools and a variety of closed containers that are filled with merchandise, select the proper tools and open each of the containers. Each container must be opened with the proper tool without damaging any of the merchandise and without inflicting self-injury. The tools must be returned to storage and the trash must be cleaned up and thrown away.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize the importance of safely handling tools.

--Students will realize that proper handling of merchandise does effect the over-all cost of store operation.

--Students will realize that by using the right tools for the job, accidents and merchandise damage can be minimized.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I OPENING CONTAINERS	2
II SAFETY FIRST, ACCIDENTS NEVER	4
Instructor's Final Checklist	
OPENING CONTAINERS	6

CHECK-OUT ACTIVITIES

Your instructor will provide a variety of closed cartons and opening tools. Open each of the cartons.

SUGGESTED REFERENCE

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, 2nd Ed., Gregg/McGraw-Hill Book Company, Saint Louis, 1980.

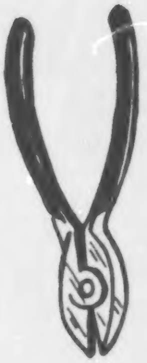
Luter, Physical Distribution, Instructional Materials Laboratory, The University of Texas at Austin, 1979.

OPENING CONTAINERS

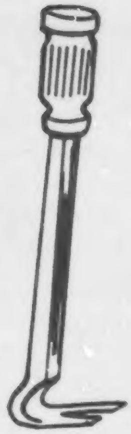
LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCE: Moffett, and Hawkins, The Receiving, Checking, Marking, Stocking Clerk, p. 68. Luter, Physical Distribution, pp. 25, 62.	
2		Instruction Sheet I OPENING CONTAINERS	
3	Discuss and demonstrate how to use each tool and how to safely open each kind of container. (A transparency master is provided in this section of the manual.) Emphasize the importance of safety when opening containers. Emphasize the importance of using the correct tools for each type of container. Emphasize the danger involved when opening banded containers. Emphasize the importance of avoiding damage to merchandise. If the student is co-oping, arrange with co-op sponsor to have student observe the opening of containers at work station.	TOOLS AND EQUIPMENT --Nail puller --Pinch bar --Box cutter --Band cutter --Hammer --Variety of containers --Overhead projector --Transparency film --Wire cutters	

OPENING CONTAINERS

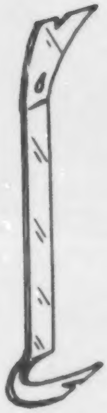
LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4		Instruction Sheet II SAFETY FIRST, ACCIDENTS NEVER	
5	To avoid accidents, closely observe as students practice opening containers.	TOOLS AND EQUIPMENT --Wire cutters --Nail pullers --Pinch bars --Box cutters --Band cutters --Hammer --Variety of containers	
6	Have the students check out on opening containers.	--Tools and equipment listed for Learning Activity #5 --Copies of the Instructor's Final Checklist (A Master Copy is provided in this section of the manual.)	



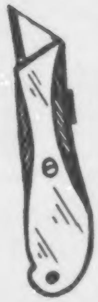
WIRE CUTTER



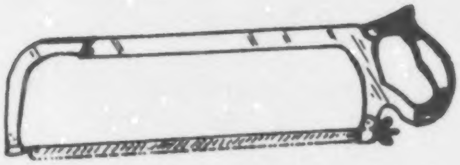
NAIL PULLER



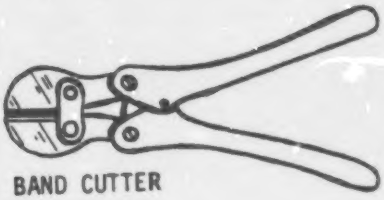
PINCH BAR



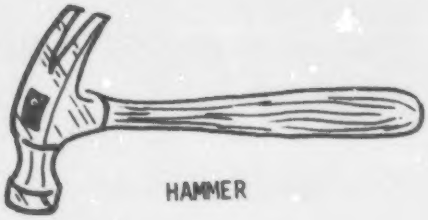
BOX CUTTER



HACK SAW



BAND CUTTER



HAMMER

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

OBJECTIVE

Provided a shipment of merchandise, a copy of the purchase order, and a copy of the invoice, check in each item. All applicable items on the Instructor's Final Checklist should be completed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that accuracy is an important job attribute.

--Students will realize that each job within a retail establishment must be performed safely, accurately, and with attention to detail.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheet	
I CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE.......	6
Student Self-Check	
I CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE........	2
Instructor's Final Checklist	
CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE..........	9

CHECK-OUT ACTIVITIES

Your instructor will provide you an order of merchandise and receiving documents. Check in the individual items of merchandise.

SUGGESTED REFERENCES

Luter, Physical Distribution, The University of Texas at Austin, 1979 Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, Gregg/McGraw-Hill Book Company, Saint Louis, 1980.

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES: Luter, Physical Distribution, pp. 61-64. Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, "Sorting the Stock and Supplies"	
2		Student Self-Check I CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE --An answer Key is included in this section of the manual.	
3		Instruction Sheet I CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE	
4	Show students how to check individual items of merchandise. Emphasize checking for: --Report discrepancies --Damage --Quantity --Quality --Items ordered per purchase order --Color, size, style per purchase order --Price per purchase order	--Invoice --Purchase order --Shipping document --Merchandise	
5	Observe as students check in individual items of merchandise. This may be done in small groups.	--Merchandise --Invoice --Shipping documents --Purchase orders	

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Use the Instructor's Final Checklist to evaluate students' performance.	--Merchandise --Invoice --Shipping documents --Purchase orders Instructor's Final Checklist. (A Master Copy is provided in this Manual.)	

STUDENT SELF-CHECK I

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

ANSWERS

1. ✓
2. ✓
3. ✓
4. ✓
5. ✓
6. ✓
7. ✓

PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS

OBJECTIVE

Given a case problem that involves a shipment of merchandise that has discrepancies, complete an overage, shortage, and damage report. All items on the Instructor's Final Checklist should be performed acceptably.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that the task of checking in merchandise involves documenting all observed discrepancies and filing claims for these discrepancies.

--The students will realize that damaged merchandise, if not reported, results in a monetary loss to their employer.

CONTENTS OF MODULE

Instruction Sheet — Learning Activity Number

I PREPARING OVERAGE, SHORTAGE, AND DAMAGE REPORTS 2

Student Self-Check

I PREPARING AN OVERAGE, SHORTAGE, AND DAMAGE REPORT 4

Instructor's Final Checklist

PREPARING OVERAGE, SHORTAGE, AND/OR DISCREPANCY REPORT 6

CHECK-OUT ACTIVITY

Your instructor will provide you with a case problem that involves a damaged shipment of merchandise. Complete an OVERAGE, SHORTAGE, AND DAMAGE REPORT.

Check-Out Activity Sheet

PREPARING OVERAGE, SHORTAGE, AND DAMAGE REPORTS . . . . . . LA #6

SUGGESTED REFERENCES

Luter, Physical Distribution, The University of Texas at Austin, 1979.

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, McGraw-Hill Book Co., Saint Louis, 1980.

PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Luter, Physical Distribution, "Filing Claims and Returns to Vendors," pp. 77-81. Moffett and Hawkins, The Receiving, Checking, Marking, Stocking Clerk, pp. 39-44.	
2		Instruction Sheet I, PREPARING AN OVERAGE SHORTAGE AND DAMAGE REPORT.	
3	Discuss in large or small groups "Preparing an Overage, Shortage, and Damage Report." Emphasize: --Accuracy --Notation of facts concerning discrepancies --Loss to employer if not reported --Legibility of writing Make a transparency of the report form and show students how to write one.	--Overhead projector --Transparency film --Copies of the OVERAGE, SHORTAGE, AND DAMAGE REPORT. (A Master Copy is provided in this section of the manual.)	
4	Assist students with Student Self-Check I.	--An Answer Key is included in this section.	
5	Make copies of the OVERAGE, SHORTAGE, AND DAMAGE REPORT forms and write practice case problems for students to report.	--Copies of the OVERAGE, SHORTAGE, AND DAMAGE REPORT FORMS, (A Master Copy is provided in this section of the manual.)	

PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Assist students in completing forms. Evaluate students practice forms.		
6	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the Manual.) --Copies of the OVERAGE, SHORTAGE, AND DAMAGE REPORT FORMS. (A Master Copy is provided in this section of the manual.) --Case problems	

STUDENT SELF-CHECK I

PREPARING AN OVERAGE, SHORTAGE, AND DAMAGE REPORT

ANSWERS

1. ✓
2. ✓
3. ✓
4. ✓
5. ✓
6. ✓
7.
8. ✓
9. ✓
10. ✓

CHECK-OUT ACTIVITY SHEET

PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS

Directions: Read the following case problem that involves the receiving of a damaged shipment of merchandise. After you have read he facts, complete the included OVERAGE, SHORTAGE, AND DAMAGE REPORT.

During the unloading of a trailer at XY Department Store, 111 Main Street, Anytown, Kentucky 00000, you notice that four (4) cartons of greeting cards have been damaged. You place the cartons aside and complete the unloading of the merchandise. After finishing the unloading, you read the Bill of Lading and learn that the shipment is being transported by I.I.I. Transport Company; their local agent is W.R. Smith, I.I.I. Transport Company, 333 Ohio Street, Anytown, Kentucky 00000. Use the present date. Sign your name as the claimant. The paid freight bill (pro) number is 23,456, and the replacement value of the greeting cards is $439.25. You open the cartons and discover that they are damaged beyond resale value. Complete an OVERAGE, SHORTAGE, AND DAMAGE REPORT.

OVERAGE, SHORTAGE, AND DAMAGE REPORT FORM

DAMAGE OR LOSS CLAIMS FORM

person to whom claim is presented	claimant's address	claimant's number
date	carrier's name	carrier's name

Claim in the amount of $________ is made against ______________________________ (carrier)

by ______________________________ (claimant) as follows:

Description of shipment ______________________________

Name and address of Consignor (shipper) ______________________________

Shipped from ______________________________ (City, Town, Station), To ______________________________ (City, Town, Station)

Final Destination ______________________________ (City, Town, Station) Via Route ______________________________ (City, Town, Station)

Bill of Lading issued by ______________________________ (Co. Name); Bill of Lading Date ______________

Paid Freight Bill Number ______________________________; Original Car No. ______________

Shipped To ______________________ ______________________________ (Consignee's Name and Address)

State any particulars ______________________________

____

DETAILED STATEMENT SHOWING HOW AMOUNT CLAIMED IS DETERMINED
(Number and description of articles, nature and extent of loss or damage, invoice price of articles, amount of claim, etc.)

Total Amount Claimed	

IN ADDITION TO THE INFORMATION GIVEN ABOVE, THE FOLLOWING DOCUMENTS
ARE SUBMITTED IN SUPPORT OF THIS CLAIM

(   ) 1. Original bill of lading, if not previously surrendered to carrier.
(   ) 2. Original paid freight ("expense") bill.
(   ) 3. Original invoice or certified copy.
4. Other particulars obtainable in proof of loss or damage claimed:

____

Remarks ______________________________

____

The foregoing statement of facts is hereby certified to as correct.

____
(Signature of Claimant)

PALLETIZING, STACKING/PILING MERCHANDISE

OBJECTIVES

(1) Provided merchandise and storage space, safely stack/pile the merchandise. All items on the Instructor's Final Checklist should be performed without error.

(2) Provided merchandise and pallets, palletize the merchandise. All applicable items on the Instructor's Final Checklist should be performed without error.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that by learning the safe, correct way to palletize and stack/pile merchandise, accidents will be prevented.

--Students will appreciate the skills of the receiving clerk and of the stock clerk.

--Students will realize that the receiving clerk is important to the overall operation of a retail establishement.

CONTENTS OF MODULE

Learning Activity Number

Instruction Sheets

I FUNCTIONS AND DESIGNS OF PALLETS 2
II CHOOSING THE CORRECT PALLET AND PALLET PATTERNS. . 4
III HOW TO STACK/PILE GOODS 6
IV A UNIT LOAD 8
V HOW TO PALLETIZE A UNIT LOAD 9

Student Self-Checks

I FUNCTIONS AND DESIGNS OF PALLETS 3
II CHOOSING THE CORRECT PALLET AND PALLET FUNCTIONS . 5
III HOW TO STACK/PILE GOODS 7
IV HOW TO PALLETIZE A UNIT LOAD 10

Instructor's Final Checklist

PALLETIZING, STACKING/PILING MERCHANDISE 13

PALLETIZING, STACKING/PILING MERCHANDISE

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with merchandise and storage space. Safely stack/pile the merchandise in the storage area.

(2) Your instructor will provide you with merchandise and pallets. Palletize the merchandise.

SUGGESTED REFERENCES

Hatchett, Warehousing, University of Texas at Austin, Austin, Texas, 1974.

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, 2nd Ed., Gregg/McGraw-Hill Book Company, Saint Louis, 1980.

PALLETIZING, STACKING/PILING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1 & 2	Discuss in large group "Palletizing, Stacking/Piling Merchandise." Make a slide show of these activities taking place in a local retailers warehouse.	SUGGESTED REFERENCES Hatchett, Warehousing, pp. 85-97. Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, pp. 47-48. Illustrations suitable for transparency are enclosed in this section.	
2		Instruction Sheet II, FUNCTIONS AND DESIGNS OF PALLETS	
3	Student Self-Check	Student Self-Check I, FUNCTIONS AND DESIGNS OF PALLETS --An answer key is included in this section.	
4		Instruction Sheet III, CHOOSING THE CORRECT PALLET AND PALLET PATTERN	
5	Student Self-Check	Student Self-Check III, CHOOSING THE CORRECT PALLET AND PALLET PATTERNS	
6		Instruction Sheet V, HOW TO STACK/PILE GOODS	
7	Student Self-Check	Student Self-Check III, HOW TO STACK/PILE GOODS	

PALLETIZING, STACKING/PILING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
8		Instruction Sheet IV, A UNIT LOAD	
9		Instruction Sheet V, HOW TO PALLETIZE A UNIT LOAD	
10	Student Self-Check	Student Self-Check IV, HOW TO PALLETIZE A UNIT LOAD --An Answer Key is provided in this section of the manual.	
11	Arrange for students to observe a demonstration of how to palletize, and stock/pile merchandise at a local retailer's warehouse. Observe safety precautions.		
12	RECOMMENDATIONS Arrange for students to practice palletizing, and stacking merchandise. Observe practice session to pervent accidents.	--Merchandise --Pallets	
13	Use the Instructor's Final Checklist to evaluate students performance. If this check-out activity cannot be performed you can design one that will check the student's knowledge of these two tasks. (Written test).	--Pallets --Merchandise --Storage area --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

FUNCTIONS AND DESIGNS OF PALLETS

ANSWERS

Part I.

1. D
2. A
3. C
4. B
5. D

TYPES AND USES OF PALLETS

ANSWERS

Part II.

1. A double-faced and nonreversible pallet that has an extended top deckboard
2. A single-faced pallet
3. Double-faced and reversible pallet

STUDENT SELF-CHECK II

CHOOSING THE CORRECT PALLET AND PALLET PATTERNS

ANSWERS

1. True
2. True
3. False
4. False
5. True
6. False
7. True
8. False
9. True
10. True

STUDENT SELF-CHECK III

HOW TO STACK/PILE GOODS

ANSWERS

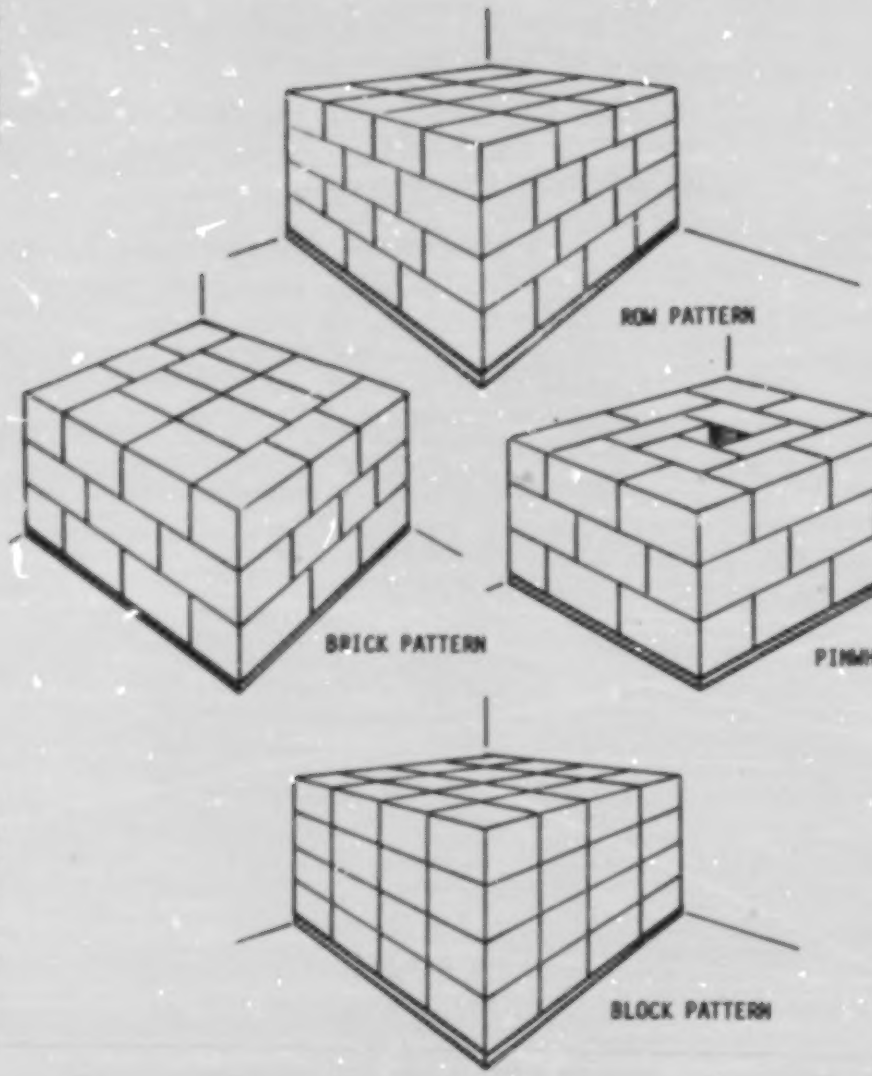
1. ____
2. ____
3. X
4.
5. X
6. X
7. ____
8. ____

STUDENT SELF-CHECK IV

HOW TO PALLETIZE A UNIT LOAD

ANSWERS

1. True
2. False
3. False
4. True
5. True
6. False
7. True
8. True
9. True
10. False

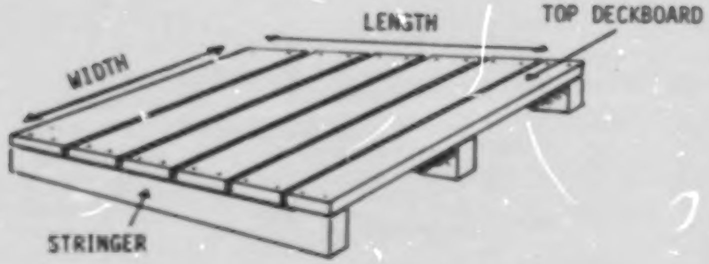


ROW PATTERN

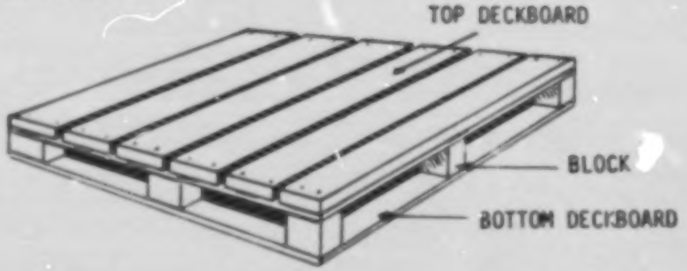
BRICK PATTERN

PINWHEEL PATTERN

BLOCK PATTERN


LENGTH
TOP DECKBOARD
WIDTH
STRINGER

SINGLE-FACED PALLET WITH TWO-WAY ENTRY


TOP DECKBOARD
BLOCK
BOTTOM DECKBOARD

DOUBLE-FACED PALLET WITH FOUR-WAY ENTRY

MOVING AND STORING MERCHANDISE

OBJECTIVE

Provided merchandise to be stored, material-handling equipment, and a storage area, move the merchandise to the storage area and store it. all items on the Instructor's Final Checklist should be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will realize that whenever merchandise is being moved it must be done safely to avoid damaging it and to avoid personal or associates injury.
--The students will realize that they must be fully trained in order to operate material-handling equipment.
--The students will realize that well-performed materials-handling activities are very important to the success of a retail establishment.
--The students will realize that proper storage will help reduce monetary losses.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I MATERIAL HANDLING EQUIPMENT USED IN RETAILERS' RECEIVING AND STORAGE AREA	6
Student Self-Check	
I SAFETY PRECAUTIONS IN THE RETAIL WAREHOUSE	4
II MOVING MATERIALS IN THE WAREHOUS AND SALES STORE	7
III STORING MERCHANDISE, SUPPLIES AND EQUIPMENT . . .	13
Instructor's Final Checklist	
MOVING AND STORING MERCHANDISE	15

CHECK-OUT ACTIVITY

Your instructor will provide you with merchandise to be stored, material-handling equipment, and a storage area. Move the merchandise to the storage area and store it.

MOVING AND STORING MERCHANDISE

SUGGESTED REFERENCES

Luter, Physical Distribution, The University of Texas at Austin, Austin, Texas, 1979.

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, Gregg/McGraw-Hill Book Co., Saint Louis, 1980.

Hatchett, Warehousing, University of Texas at Austin, Austin, 1974.

MOVING AND STORING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss in large or small groups "safety in moving and handling merchandise."	SUGGESTED REFERENCES Luter, Physical Distribution, "Safety in Handling Merchandise." Moffett, Hawkins, The Receiving, Checking Marking, Stocking Clerk, "Safety" Hatchett, Warehousing "Warehouse Safety."	
2	Discuss and demonstrate in large or small groups how to safely lift, carry and put down loads.	--Boxes of merchandise	
3		Student Self-Check I, SAFETY PRECAUTIONS IN THE RETAIL WAREHOUSE	
4	Observe closely as students demonstrate how to lift, carry and put down loads.	--Boxes of merchandise	
5		Instruction Sheet I, MATERIAL HANDLING EQUIPMENT USED IN RETAILERS' RECEIVING AND STORAGE AREA	
6	Discuss and show slides of material handling equipment used in local and other retailers' warehouses.	SUGGESTED RESOURCE --R-16 Receiving and Storing Merchandise --Slides of material handling equipment --35 mm projector	

MOVING AND STORING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Arrange for students to observe demonstation of how to safely move materials with the following material handling equipment. --Conveyor --Forklift --Tow motor --Observe safety precautions --Dollies (2 and 4 wheel) --Basket (2 and 4 wheel) Discuss "Safety When Operating Material Handling Equipment." Design and give students "Safety When Moving Merchandise" test.	Dollies (2 and 4 wheel) Stocking baskets	
8		Student Self-Check III, MOVING MATERIALS IN THE WAREHOUSE AND RETAIL SALES STORE	
9	Have students practice moving merchandise with two-wheel dollies, baskets and other manually operated material handling equipment. To prevent accidents, observe closely as students practice.		
10		SUGGESTED REFERENCES Moffett, Hawkins The Receiving, Checking Marking, Stocking Clerk "STOCKING AND STORAGE"	

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MOVING AND STORING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
		Luter, Physical Distribution, "MERCHANDISE STORAGE"	
11	Arrange for students to observe a demonstration of how merchandise is stocked in storage in local retailer's warehouse.	SUGGESTED RESOURCE R-15 Moving Goods From Receiving to Storage (can be used to help prepare students for observation of storing activities) 35 mm projector	
12		Student Self-Check III, STORING MERCHANDISE, SUPPLIES, AND EQUIPMENT	
13	Observe as students practice stocking merchandise in storage --Set up or arrange for area for students to practice storing merchandise to prevent accidents observe closely as students practice.	Merchandise, material handling equipment, storage area.	
14	Use Instructor's Final Checklist to evaluate each students' final performance, if unable to set up for this check-out activity design a test that will evaluate students knowledge of the moving and storage procedures it is suggested that manually operated equipment be used. It is also suggested that the student can demonstrate hand carrying of merchandise.	Instructor's Final Checklist, MOVING AND STORING MERCHANDISE --2 wheel dolly --4 wheel dolly --Stocking baskets --Other manually operated storage equipment	

STUDENT SELF-CHECK I

SAFETY PRECAUTIONS IN THE RETAIL WAREHOUSE

ANSWER KEY

1. a.

2. a.

3. a.
   b.
   c.
   d.
   e.
   f.
   g.
   h.
   i.
   j.
   k.
   l.
   m.
   n.
   o.
   p.

STUDENT SELF-CHECK II

MOVING MATERIALS IN THE WAREHOUSE AND SALES STORE

ANSWER KEY

The Two Wheel Hand Truck

1.
2.
3.
4.
5.
6.
7.

The Platform Truck

1.
2.
3.

The Tractor-Trailer (Tow Motor)

1.
2.
3.
4.
5.
6.

The Fork Lift

1.
2.
3. a.
   b.
   c.
   d.
   e.

Pallets

1.
2.
3.

STUDENT SELF-CHECK II, (page 2)

Pallet Lift Truck

1.
2.
3.
4.

Conveyors

1.
2.
3.
4.
5.
6.
7.
8.

Hand Carrying Materials

1.
2.
3.
4.
5.
6.
7.
8.
9.
10. a.
    b.
    c.
    d.
    e.
    f.

STUDENT SELF-CHECK III

STORING MERCHANDISE, SUPPLIES AND EQUIPMENT

ANSWER KEY

1. h, d, e, f
2. a, b, c, d, e
3. (1)
4. a, b, c, d, e, f, g, h, i, j.

MOVING GOODS FROM RECEIVING TO STORAGE

FRAME 1

The receiving area of a retailer's warehouse is the location where incoming merchandise is unloaded. It is where the delivered merchandise is checked by receiving clerks to determine that the merchandise is what was ordered, its condition, the number received and the receiving area is where it rests until it is either sent to storage or to checkers and price markers.

This slide-tape presentation is designed to show you the activities performed and equipment used when moving merchandise from the receiving area to storage.

FRAME 2

One of the primary tasks of a receiving clerk is to move received merchandise to storage where it will be stocked until needed by customers or to replace sold merchandise on the sales floor of the retail store.

FRAME 3

Can you imagine how long it would take if receiving clerks had to unload and move each received container by hand? With the following equipment, merchandise can be moved safely, quickly and efficiently from the carrier to storage.

-The motorized fork lift when safely used, can be driven up to and into the trailers of many carriers.

FRAME 4

The mechanically operated forklift can be used when unloading. This piece of unloading equipment may be used when the motorized fork lift is too heavy for the bed of the carrier's vehicle.

FRAME 5

Before unloading, this bridge plate is placed between the unloading dock and the carrier's vehicle to provide safe entry for moving equipment. Some receiving docks have permanently installed types of bridge plates that are push button activitated, and self leveling.

FRAME 6

When fork lifts cannot be used for unloading received merchandise, manually operated equipment such as the following are used to transport the merchandise from the carrier to storage:

FRAME 7

the two wheel dolly,

FRAME 8

the four wheel dolly,

FRAME 9

the equipment transporter and

FRAME 10

conveyor belts.

FRAME 11

When the retailer's warehouse is set up for palletized bulk storage, the motorized fork lift is often used for placing merchandise in storage.

FRAME 12

The platform lift is used when aisles are to narrow for forklifts to effectively operate.

FRAME 13

Ladders that are designed for safely storing merchandise are used in many storage areas.

FRAME 14

Retailer's warehouses are designed for merchandise to be stored in palletized bulk form and

FRAME 15

shelf storage.

FRAME 16

You have seen the equipment used for moving received merchandise to storage and you have seen the kinds of storage used in a retailer's warehouse, there is one other item used in the movement of merchandise and that is the physical strength of the receiving clerk. When equipment cannot be used for numerous reasons, the receiving clerk must physically move containers to and out of storage. When this is done correctly it can be done safely and easily.

Moving received merchandise from the receiving area to storage is an important task of the receiving clerk and it must be accomplished safely and it must be done without damaging the merchandise.

FRAME 17

The End.

OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR

OBJECTIVE

Given a department stock requisition form, goods to be delivered, material-handling equipment, and location transfer forms, identify and deliver the merchandise to the requested location. When delivery has been completed there must be no damage to the merchandise, it must be delivered to the correct location, and there should be no damage to the merchandise or injury to the handler or fellow workers.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that safety is an important phase of material handling.
--The students will realize that merchandise that is damaged during handling cannot be sold and it becomes a loss to the store.
--The students will realize that for retail merchandise to be sold it must be seen by the customer.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheet	
I WHY RETAILERS HAVE WAREHOUSES, STOCKROOMS, AND STORAGE AREAS..................................	2
Student Self-Check	
I OBTAINING MERCHANDISE FROM THE STOCKROOM OR WAREHOUSE..	3
Instructor's Final Checklist	
OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR..	4

CHECK-OUT ACTIVITY

Your instructor will provide you a department stock requisition, an area where merchandise is stored, material handling equipment, and an area where the merchandise is to be moved. Move the requested merchandise to the designated area.

SUGGESTED REFERENCE

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, Gregg/McGraw-Hill Book Company, St. Louis, 1980.

OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss material handling safety with students in small or large groups before students begin to handle materials.	SUGGESTED REFERENCE Moffett and Hawkins, The Receiving, Checking Marking, Stocking Clerk, 2nd Edition, pp. 61-70.	
2	Discuss how retailers are requiring less warehouse space because of faster modes of transportation and computerized inventory controlled systems. Demonstrate for students how to safely handle materials and material-handling equipment. Demonstrate for students how to safely pick up, carry, and put down materials. Plan a field trip to a retailer's warehouse to observe how materials are moved from storage to sales floor.	Instruction Sheet I, WHY RETAILERS HAVE WAREHOUSES, STOCKROOMS AND STORAGE AREAS	
3	Discuss Student Self-Check I with students in small groups.	Student Self-Check I, OBTAINING MERCHANDISE FROM THE STOCKROOM OR WAREHOUSE --Answer key is included in this section.	
4	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	If this Check-Out Activity cannot be accomplished it is suggested that a written test be designed that will measure the students knowledge of the task.		

OBTAINING MERCHANDISE FROM THE STOCKROOM OR WAREHOUSE

ANSWER KEY

If you checked each of the activites except number "6", you have a good understanding of the activities that you will perform in some retail establishments when you are removing merchandise from storage.

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

OBJECTIVE

(1) Provided merchandise, price tickets, price marking tools, price ticket fasteners and a price list (retail), price mark each item of merchandise. Each item of merchandise must be marked clearly with the correct price and store information.

(2) Provided price marking tools and supplies, a price change list, and merchandise, change the prices on the merchandise. When completed, each item of merchandise on the price change list must be correctly and legibly price-marked.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that information placed on price tickets has to be accurate if retailers are to operate profitably.
--Students will realize that price tickets are communication tools and must be completed clearly and accurately if they are to serve this purpose.
--Students will realize that new computer methods of price marking are here and that they must know how these methods will help.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I REASONS FOR CHANGING PRICES OF MERCHANDISE ON THE SALES FLOOR	5
II HOW TO MAKE PRICE CHANGES	6
Student Self-Check	
I PRICE MARKING MERCHANDISE	2
Instructor's Final Checklist	
PRICE MARKING AND CHANGING PRICES ON MERCHANDISE	9

CHECK-OUT ACTIVITIES

(1) Your instructor will provide a variety of merchandise and price marking tools and supplies. Price mark each item of merchandise.

(2) Your instructor will provide you with a price change list, price marking tools, price tickets, and merchandise. Change the prices on the merchandise.

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

RECOMMENDED REFERENCE

Moffett, Hawkins, The Receiving, Checking, Marking, and Stocking Clerk, Gregg/McGraw-Hill Book Company, 1980.

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCE Moffett and Hawkins, The Receiving, Checking, Marking, Stocking Clerk, "Marking Goods," pp. 80-96.	
2		Student Self-Check I, PRICE MARKING MERCHANDISE (answers in this section of manual.) --An Answer Key is provided in this section of the manual.	
3	Discuss and demonstrate for students how to price mark merchandise. Arrange for a local retailer to show and demonstrate price marking machines. Emphasize clarity and accuracy of price marking. Show students the variety of price markers that may be used in retailing. --Emphasize that price markers and tags are selected for specific merchandise. --Emphasize the changes that are taking place in price marking methods (computer-based systems). --Explain Universal Vendor Marking (UVM). --Explain Universal Price Code (UPC).		

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Set up a learning lab with price markers and dummy merchandise with which students can practice. Observe students as they practice.	--Price tickets --Price markers (variety) --Dummy merchandise --Work area	
5	In small or large groups, discuss the information that is in Instruction Sheet I.	Instruction Sheet I, REASONS FOR CHANGING PRICES OF MERCHANDISE ON THE SALES FLOOR	
6		Instruction Sheet II, HOW TO MAKE PRICE CHANGES	
7	Demonstrate how to change prices on merchandise. Emphasize removing merchandise from the sales floor if the price is to be increased.	--Price marking tools --Merchandise	
8	Prepare a price change list for students to use in a practice session. Check students' practice to determine if they need help in developing the skill to change prices on merchandise.	--Merchandise --Price marking equipment --Materials --Price tags	
9	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist (A Master Copy is provided in this section of the manual.) --Price markers --Tickets --Tags --Labels --Merchandise --Price change list	

STUDENT SELF-CHECK I

PRICE MARKING MERCHANDISE

Answers

1. +
2. -
3. +
4. +
5. +
6. +
7. +
8. +
9. +
10. +
11. +
12. +
13. +
14. +
15. +
16. +

PRICE MARKING AND STOCKING

FRAME 1

Title slide.

FRAME 2

Price marking and stocking merchandise is one of the tasks performed by stock clerks in retailing establishments. This slide-tape presentation is designed to show you how this task is done in one type of a retail store-a grocery store.

FRAME 3

When the truck arrives at the receiving dock, receiving and stock clerks immediately begin the unloading process. Observe closely and you can see that the merchandise has been palletized by the supplier's warehouse personnel. Why are the plastic bands around the merchandise? If you said "to keep the merchandise from falling during loading, shipping, and unloading you are correct. Also notice that two people are unloading. Why? Simply, this pallet load of merchandise is heavy. It is much safer to have two people unload heavy loads.

FRAME 4

What material-mover is being used by these receiving and stock clerks? It is a manually operated pallet lift. The yellow device in the upper right corner of the picture is a spot light that is used to light the interior of the truck. This helps make unloading a safer procedure.

FRAME 5

The merchandise is moved on to

FRAME 6

the sales floor.

FRAME 7

It is spotted or (placed) close to the aisle where the price markers and stock clerks will shelve the merchandise.

FRAME 8

Stock clerks, using a manually operated fork lift, take each pallet load of merchandise and spot each carton near the location where it will be stocked on the shevles.

FRAME 9

Each pallet load of merchandise will be unloaded in this manner.

FRAME 10

Receiving clerks continue to unload the suppliers truck.

FRAME 11

The stock clerks continue to spot the incoming merchandise.

FRAME 12

After the merchandise has been spotted the stock clerks open the cartons and

FRAME 13

carefully price mark each item.

FRAME 14

Before stocking the new merchandise, the shelf is cleaned

FRAME 15

and the new merchandise is placed on the shelf. Notice how the stock clerk has placed the merchandise so that the customer will be able to read the label.

FRAME 16

This stock clerk has stocked the canned merchandise and spends a few moments to face each item so that the labels are straight and not up-side-down.

FRAME 17

Price marking is continued. Observe how the carton of merchandise has been elevated to make it easier for the stock clerk to price mark.

FRAME 18

After price-marking, the items are placed on the shelf and

FRAME 19

faced.

FRAME 20

After the merchandise is removed from the cartons, the stock clerk breaks each carton down and

FRAME 21

takes the trash to

FRAME 22

the stores trash compactor,

FRAME 23

where the cartons are crushed and tied into

FRAME 24

neat piles that can be easily hauled away for disposal.

FRAME 25

The end.

STOCKING/SHELVING MERCHANDISE

OBJECTIVE

Provided merchandise, a price list, display props/fixtures, stocking tools, and supplies, check in and stock the merchandise. When completed, all applicable items on the Instructor's Final Checklist must be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that customers must see merchandise if they are to buy it.
--Students will realize that a well-arranged, well-organized, and well-displayed store is a store that will sell merchandise.
--Students will realize that merchandise which is displayed well is a service to customers.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA	1
II STOCKING SHELVING MERCHANDISE	3
III OPENING CARTONS OR CASES	4
IV PROPER PRICE MARKING	8
V STOCKING SHELVES AND RACKS	10
VI HOW TO SHELVE/STOCK MERCHANDISE ON THE STORE/DEPARTMENT SALES FLOOR	11

Student Self-Checks

I CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA	2
II OPENING CARTONS OR CASES	5
III PROPER PRICE MARKING	9
IV STOCKING SHELVES AND RACKS	13

Instructor's Final Checklist

STOCKING/SHELVING MERCHANDISE	14

CHECK-OUT ACTIVITY

Your instructor will provide merchandise, shelves, display cases, and racks. Check in and stock the merchandise.

STOCKING/SHELVING MERCHANDISE

SUGGESTED REFERENCES

Luter, Basic Visual Merchandising, The University of Texas at Austin, 1982.

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk.

STOCKING/SHELVING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss with students Instruction Sheet I, "Checking in Merchandise Received From the Receiving Area."	Instruction Sheet I, CHECKING IN MERCHANDISE RECEIVED FROM THE RECEIVING AREA	
2	Student Self-Check I	Student Self-Check I, CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA --An answer key is provided in this section of the manual.	
3	In small or large groups, discuss the information included in the Instruction Sheet.	Instruction Sheet II, STOCKING/SHELVING MERCHANDISE	
4		Instruction Sheet III, OPENING CARTONS OR CASES.	
5	Student Self-Check II	Student Self-Check II, OPENING CARTONS AND CASES. --An answer key is provided in this section of the manual.	
6			
7	In small or large groups, discuss the information in the reference.	Moffett and Hawkins, The Receiving, Checking, Marking, Stocking Clerk, pp. 80-96.	
8	Demonstrate proper price marking.	Instruction Sheet IV, PROPER PRICE MARKING	
9	Student Self-Check III Supervise the students as they practice price marking. Have a wide variety of merchandise	Student Self-Check III, PROPER PRICE MARKING --An answer key is provided in this section of the manual.)	

STOCKING/SHELVING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	and price tags available.	--Merchandise for price marking --Price markers --Price tags	
10	In small or large groups, discuss and demonstrate the information included in the Instruction Sheet and reference.	Instruction Sheet V, STOCKING SHELVES AND RACKS Luter, Basic Visual Merchandising, "Visual Merchandising for Self-Selection."	
11	In small or large groups, discuss the information included in the Instruction Sheet.	Instruction Sheet VI, HOW TO SHELVE/STOCK MERCHANDISE ON THE STORE/DEPARTMENT SALES FLOOR SUGGESTED RESOURCE: "Stocking Shelves and Racks," Filmstrip and Cassette tape from Singer	
12	Demonstrate how to stock shelves.		
13	Student Self-Check IV	Student Self-Check IV, STOCKING SHELVES AND RACKS	
14	Use the Instructor's Final Checklist to evaluate each student's performance.	--Merchandise --Shelving --Display cases --Racks --Price marking tools and equipment --Copies of the Instructor's Final Checklist, STOCKING/SHELVING MERCHANDISE. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA

ANSWERS

1. +
2. +
3. +
4. -
5. +
6. -
7. +
8. +
9. +
10. +

STUDENT SELF-CHECK II

OPENING CARTONS OR CASES

ANSWERS

1. b
2. d
3. a
4. e
5. c

STUDENT SELF-CHECK III

PROPER PRICE MARKING

ANSWERS

QUESTIONS:

1. Loss of money, time, delays, inconvenience, angry customers.
2. Stick stamp, band stamp. label gun, felt tip marker.
3. Band stamp.
4. Stick stamp.
5. Label gun

EXERCISES

	YES	NO
1. I opened the cartons safely with the case cutter, always cutting away from myself.	____	____
2. I opened the one-layer carton of merchandise by:		
a. Adjusting the case cutter to the thickness of the carton.	____	____
b. Cutting around the lid on three sides.	____	____
c. Pulling the lid up and cutting the fourth side from the inside of the top.	____	____
3. I opened the carton with two layers of merchandise by:		
a. Adjusting the case cutter to the thickness of the carton.	____	____
b. Cutting away from myself.	____	____
c. Placing the point of the box cutter into one side and cutting each of the four sides halfway between the top and the bottom, turning the case after each cut.	____	____

STUDENT SELF-CHECK III, (page 2)

	YES	NO
4. I opened the carton of merchandise in cellophane bags by:		
a. Adjusting the case cutter to the thickness of the carton.	____	____
b. Cutting an "X" on the top of the carton.	____	____
c. Pulling back the cut flaps for price marking.	____	____
5. I used the proper price marker for each carton of merchandise.	____	____
6. I placed the correct price on each item of merchandise.		
a. 59¢ on one-layer carton	____	____
b. $1.98 on one-layer carton	____	____
c. 98¢ on two-layer carton	____	____
d. 77¢ on cellophane-wrapped items	____	____
7. I checked to see that all merchandise was clearly and accurately price marked.	____	____

STUDENT SELF-CHECK IV

STOCKING SHELVES AND RACKS

ANSWERS

1. 20%
2. Six-wheel truck, pallets, skid, two-wheel dolly, four wheel cart
3. Product, brand name, size, color
4. Stock allocation
5. Merchandise on the shelf, merchandise being stocked, shelf tag
6. Salvage

Instructor's Guide Sheet Module R-19

PREPARING STOCK FOR INVENTORY

OBJECTIVES

(1) Provided the necessary supplies, prepare the merchandise for inventory. All applicable items on the Instructor's Final Checklist should be performed.

(2) Provided merchandise, an inventory recording form, and a calculator, inventory the merchandise. All entries on the inventory recording form should be legible; all merchandise should be correctly counted; and all mathematical computations should be correct.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that accuracy is a necessary attribute when performing retailing tasks.
--Students will realize that an accurate inventory is one of the ways that retailers can collect information concerning the over-all business success of the store.

CONTENTS OF MODULE

Instruction Sheets — Learning Activity Number

I PREPARING STOCK FOR INVENTORY 2
II INVENTORY PROCEDURES 10
III HELPFUL HINTS FOR TAKING INVENTORY 12

Student-Self-Checks

I WHY RETAILERS TAKE INVENTORY 4
II PREPARING STOCK FOR INVENTORY 5
III THE ADVANTAGES AND DISADVANTAGES OF INVENTORY METHODS 9
IV INVENTORY PROCEDURES 11

Instructor's Final Checklist

PREPARING STOCK FOR INVENTORY 14

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with the necessary supplies and merchandise. Prepare the merchandise for inventory.

(2) Your instructor will provide you merchandise and an inventory recording form. Inventory the merchandise.

PREPARING STOCK FOR INVENTORY

SUGGESTED REFERENCES

Luter, Physical Distribution, Physical Inventory."

Samson, Little, Wingate, Retail Merchandising, Concepts and Applications, "Physical Inventory."

Bodle and Corey, Retail Selling, "Taking A Physical Inventory."

Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Physical Inventory."

PREPARING STOCK FOR INVENTORY

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss in small or large groups the purpose of physical inventory and how store employees are expected to help. Discuss before students begin module.	SUGGESTED REFERENCES: Luter, Physical Distribution, "Physical Inventory." Samson, Little, Wingate, Retail Merchandising, Concepts and Applications, "Taking A Physical Inventory." Bodle and Corey, Retail Selling, "Taking A Physical Inventory." Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Physical Inventory."	
2		Instruction Sheet I, PREPARING STOCK FOR INVENTORY	
3	Discuss and demonstrate for students how to prepare merchandise for physical inventory.	SUGGESTED RESOURCE: Filmstrip/cassette: Singer, "Retail Inventory Practices" and "Computers For Retail Use."	
4		Student Self-Check I, WHY RETAILERS TAKE INVENTORY --An answer key is provided in this section of the manual.	
5		Student Self-Check II, PREPARING MERCHANDISE FOR INVENTORY --An answer key is provided in this section of the manual.	

PREPARING STOCK FOR INVENTORY

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Observe students' practice sessions. Have students practice in teams of two.	--Materials for a pre-count --Supplies for students to prepare for inventory --Merchandise	
7		SUGGESTED REFERENCE Same as listed in LA #1.	
8	Discuss and demonstrate how to take a physical inventory. Emphasize: --Legibility of writing clearly and accurately. --Accuracy of counting merchandise. --How to use a calculator. --How to pattern movement on props and fixtures to avoid missing merchandise. Show transparency of inventory form and discuss information that is recorded on it. Set up props and or fixtures with displayed merchandise. Discuss computers used in keeping perpetual inventory.	--Copies of the Inventory Form. (A Master Copy of the inventory form included in this section.) --Props and/or fixtures --Merchandise for demonstration	
9		Student Self-Check III, THE ADVANTAGES AND DISADVANTAGES OF INVENTORY METHODS --An answer key is provided in this section of the manual.	

PREPARING STOCK FOR INVENTORY

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
10		Instruction Sheet II, INVENTORY PROCEDURES	
11		Student Self-Check IV, INVENTORY PROCEDURES --An Answer Key is provided in this section of the manual.	
12		Instruction Sheet III, HELPFUL HINTS FOR TAKING INVENTORY	
13	Set up props and fixtures with merchandise for students to practice taking physical inventory. Observe the student practice session.	--Props and fixtures --Merchandise --Inventory Form --Calculator	
14	Use Instructor's Final Checklist to evaluate students performance. Have students prepare merchandise for inventory. Have student take a physical inventory. Set up props and fixtures with merchandise for students to use in preparing for and taking physical inventory.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.) --Merchandise --Inventory Form --Calculator	

STUDENT SELF-CHECK I

WHY RETAILERS TAKE INVENTORY

ANSWERS

1, 2, 3, 4, 5, 6

STUDENT SELF-CHECK II

PREPARING STOCK FOR INVENTORY

ANSWERS

1, 2, 3, 4, 5, 6

STUDENT SELF-CHECK III

THE ADVANTAGES AND DISADVANTAGES OF INVENTORY METHODS

ANSWER KEY

1. F
2. F
3. T
4. T
5. T
6. F
7. T
8. F
9. T
10. T

STUDENT SELF-CHECK IV

INVENTORY PROCEDURES

ANSWER KEY

2, 7, 6, 3, 5, 4, 1

INVENTORY SHEET

Date: ____________ Fixture No.: ____________

Department Name: ______________________________ Department No.: __________

Counted By: ______________________ Entered By: ______________________

Checked By: ______________________

Stock Number	Description	Season Code	Quantity	Unit	Unit Price	Total Price

TOTAL __________

MAINTAINING INVENTORY CONTROL SYSTEMS

OBJECTIVE

Given a list of inventory control activities that are performed by retail salespeople and receiving clerks identify the ones that each performs. Each activity must be correctly identified.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize the importance of maintaining an accurate perpetual inventory control system.

--Students will realize the importance of accurately performing activities which provide data for their stores perpetual inventory control sysstem.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I A LOOK AT INVENTORY CONTROL SYSTEMS	3
II METHODS OF INVENTORY CONTROL	4
III THE STOCK RECORD CARD PERPETUAL INVENTORY CONTROL SYSTEM	7
IV STARTING A PERPETUAL INVENTORY SYSTEM	9
V WHAT RETAIL EMPLOYEES DO TO HELP MAINTAIN A PERPETUAL INVENTORY CONTROL SYSTEM	11
Student Self-Checks	
I METHODS OF INVENTORY CONTROL	5
II STOCK RECORD CARDS	8
III STARTING A PERPETUAL INVENTORY SYSTEM	10
Instructor's Final Checklist	
MAINTAINING INVENTORY CONTROL SYSTEMS	12

CHECK-OUT ACTIVITY

Given a list of inventory control activities that are performed by retail salespeopel and receiving clerks, identify the ones that each performs. Each activity must be correctly identified.

SUGGESTED REFERENCES

Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, 6th ed., Gregg/McGraw Hill, Saint Louis

MAINTAINING INVENTORY CONTROL SYSTEMS

Wingate, John W. and Harland E. Samson, *Retail Merchandising*, 8th ed., South-Western, Cincinnati.

Ditzenberg, Kidney, *Selling, Helping Customers Buy*, South-Western, Cincinnati, 1981.

Samson, Little and Wingate, *Retail Merchandising Concepts and Applications*, South-Western, Cincinnati, 1982.

Luter, *Physical Distribution*, instructional Materials Laboratory, University of Texas at Austin, Austin, 1979.

Bodle and Corey, *Retail Selling*, Gregg/McGraw-Hill, Saint Louis.

MAINTAINING INVENTORY CONTROL SYSTEMS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Wingate and Samson, Retail Merchandising, "Stock Control." Ditzenberger and Kidney, Selling, Helping Customers Buy, "Maintaining Adequate Merchandise Stock." Luter, Physical Distribution, "Inventory Control." Bodle and Corey, Retail Selling. "Maintaining Stock Control Records." Samson, Little and Wingate, Retail Merchandising, "Stock Management." Richart, Meyer, Haines and Harris, Retailing, Principals and Practices, "Inventory Control."	
2	Discuss in large group the importance of inventory control methods in a retail establishment. Emphasize: --Maintaining stock level. --Controling shrinkage. --Obtaining a report of stock turn. --Assisting in acquiring a report of profit or loss. --Serving the needs of customers.	SUGGESTED RESOURCE Filmstrip: "Computers for Retail Use," Singer, 35 mm and cassette tape. Filmstrip: "Retail Inventory Practices," Singer 35 mm and cassette tape.	

MAINTAINING INVENTORY CONTROL SYSTEMS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Suggestions: --Discuss automated inventory control methods. --Computers. --Terminals. --Hand-recorded data systems.		
3		Instruction Sheet I, A LOOK AT INVENTORY CONTROL SYSTEMS	
4		Instruction Sheet II, METHODS OF INVENTORY CONTROL	
5		Student Self-Check I, METHODS OF INVENTORY CONTROL --An Answer Key is provided in this section of the manual.	
6	Discuss and demonstrate how to maintain stock record cards: --Beginning inventory, --Purchases, --Back orders, --Sales, --On hand. Discuss how information is used by buyers and store management to control inventory levels.	--Stock record cards --Purchase orders --Sales tickets --Inventory documents	
7		Instruction Sheet III, STOCK RECORD CARD	

MAINTAINING INVENTORY CONTROL SYSTEMS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
8		Student Self-Check II, STOCK RECORD CARDS --An Answer Key is provided in this section of the manual.	
9		Instruction Sheet IV, STARTING A PERPETUAL INVENTORY SYSTEM	
10		Student Self-Check III, STARTING A PERTETUAL INVENTORY SYSTEM --An Answer Key is provided in this section of the manual.	
11		Instruction Sheet IV, WHAT RETAIL EMPLOYEES DO TO HELP MAINTAIN A PERPETUAL INVENTORY CONTROL SYSTEM	
12	Use the Instructor's Final Checklist to evaluate the student's performance.	Check-Out Activity is included in this section. --An Answer Key is provided in this section of the manual. --Copies of the Instructor's Final Checklist, MAINTAINING INVENTORY CONTROL SYSTEMS. (A Master Copy is provided in this section of the manual.	

STUDENT SELF-CHECK I

METHODS OF INVENTORY CONTROL

ANSWER SHEET

1. a
2. c
3. b
4. b
5. c

1. F
2. T
3. T
4. T
5. F

TAKING PHYSICAL INVENTORY

FRAME 1

As an employee of a retail establishment you will be asked to assist in taking physical inventory. Your department buyer or manager or your store owner will assign you specific areas of the store to inventory. Each retailer will have somewhat different procedures and forms for doing this activity but the major goals are the same - to count each item of merchandise in the store and warehouse to determine 1) stock levels, 2) the amount of merchandise sold since the last physical inventory, 3) the amount of merchandise lost through shrinkage, 4) the amount of inventory that will be taxable, and 5) to adjust the perpetual inventory records.

FRAME 2

You will be given the following equipment and materials to use in taking a physical inventory:

-A pencil or ball point pen

-A hand held calculator and

-A form for recording the count of merchandise

FRAME 3

Your supervisor, with help of another store employee will design a plan for taking the physical inventory.

FRAME 4

You will be assigned specific sections of the store to count and record.

FRAME 5

The count of each item is multiplied by its retail price and this total is

FRAME 6

recorded on the inventory form.

FRAME 7

As you are counting an assigned section in the store, others are counting and recording assigned sections in the store.

FRAME 8

They also will be recording their count.

FRAME 9

When each assigned section is counted and recorded the person assigned to the section places a sign on the section to tell the supervisor and other counters that the section has been inventoried.

FRAME 10

To summarize, your responsibilities when taking inventory, will be to count each item of merchandise within the store sections

FRAME 11

assigned to you by your supervisor,

FRAME 12

record the count on your calculator, multiply the count by the retail price and

FRAME 13

write the amount on your inventory form.

FRAME 14

Notify others that you have inventoried your assigned section.

FRAME 15

The end.

CHECK-OUT ACTIVITY

MAINTAINING INVENTORY CONTROL SYSTEMS

Directions: The following list of activities describes what retail salespeople and receiving clerks do to assist in maintaining inventory control systems in retail establishments. Identify those that a receiving clerk does by placing an RC in the space provided. Identify those performed by a retail salesperson by placing an RS in the spaced provided.

1. _____ When ringing sales on cash register terminals the item(s) stock number, and units, purchased by customers and price per unit is entered.

2. _____ Receiving documents are sent to the stock record clerk to be entered into the perpetual inventory control system.

3. _____ Shipments of merchandise are throughly checked and copies of receiving documents are sent to the stock control clerk.

4. _____ Merchandise returned by customers is documented and the return forms are sent to the stock control clerk.

5. _____ Merchandise transferred from one store to another store is reported on a transfer form and a copy of transfer form is sent to stock record clerk.

6. _____ Merchandise pulled from the sales floor because of damage is reported on store form and sent to stock record clerk.

7. _____ Sales transactions are written on sales tickets and copies of sales tickets are sent to stock record clerk.

8. _____ Merchandise returned to vendor for any reason is documented on a form and a copy of the form is send to the stock record clerk.

9. _____ Copies of physical inventory forms are sent to the stock record clerk.

10. _____ All information concerning inventory data must be reported accurately and legibly to the stock record clerk.

CHECK-OUT ACTIVITY

MAINTAINING INVENTORY CONTROL SYSTEM

ANSWER KEY

1. RS (retail salesperson)
2. RC (receiving clerk)
3. RC (receiving clerk)
4. RS (retail salesperson)
5. RS or RC (retail salesperson or receiving clerk - depends on who originates the shipment of merchandise.)
6. RS (retail salesperson)
7. RS (retail salesperson)
8. RC or RS (receiving clerk or retail salesperson - depends on who originates the send back.)
9. RC and RS (If both are involved in the physical inventory they both send copies of the inventory report to the stock record clerk so that stock record cards or computer stored inventory can be adjusted.)
10. RC and RS (receiving clerk and retail salesperson)

PREPARING GOODS FOR RETURN TO VENDOR

OBJECTIVE

Provided merchandise, address label, packing filler, vendor address, charge-back forms/memorandum invoice, container, wrapping materials, shipping forms, and scales, prepare merchandise for return to the vendor. The merchandise must be packed to insure safe arrival and be securely wrapped. Labeling must indicate method of shipment and complete address of sender and receiver.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize the importance of checking received merchandise shipments so that damaged and incorrect items can be properly returned to the vendors.

--Students will realize that quality control of merchandise shipments must be maintained if maximum cost controls are to be maintained.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I RETURNING MERCHANDISE TO VENDORS.................	5
II PREPARING MERCHANDISE FOR SHIPPING...............	7

Student Self-Checks	
I RETURNS TO VENDORS..............................	2
II VENDOR RETURN FORMS.............................	4
III RETURNING MERCHANDISE TO VENDORS...............	6

Instructor's Final Checklist	
PREPARING GOODS FOR RETURN TO VENDOR.................	9

CHECK-OUT ACTIVITY

Your instructor will provide you with merchandise, containers, and shipping materials. Prepare the merchandise for return to the vendor.

SUGGESTED REFERENCES

Moffett, Hawkins, The Receiving, Checking, Marking, Stocking Clerk, Gregg, McGraw-Hill Book Company, St. Louis, 1980.

Luter, Physical Distribution, The University of Texas at Austin, 1979.

PREPARING GOODS FOR RETURN TO VENDOR

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss with students the importance of maintaining quality control of merchandise received from vendors.	SUGGESTED REFERENCES Moffett and Hawkins, *The Receiving, Checking, Marking, Stocking Clerk*, "Returning Goods and Making Claims." OR Luter, *Physical Distribution*, "Filing Claims and Returns to Vendors."	
2		Student Self-Check I, RETURNS TO VENDORS --An answer key is provided in this section of the manual.	
3	Assist students in completing shipping forms.	Student Self-Check II, VENDOR RETURN FORMS --An answer key is provided in this section of the manual.	
4		Instruction Sheet I, RETURNING MERCHANDISE TO VENDOR	
5	Assist students in completing Self-Check.	Student Self-Check III, RETURNING MERCHANDISE TO VENDOR --An answer key is provided in this section of the manual.	

PREPARING GOODS FOR RETURN TO VENDOR

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Discuss and demonstrate in large or small groups "How to Prepare Merchandise for Shipping," i.e., --Fragile merchandise, --Non-fragile merchandise. Show students how to complete the vendor return form.	Packing materials: --Packing --Address labels --Boxes --Tape --Merchandise --Scissors (A Master Copy of a Vendor Return Form is included in this section.)	
7		Instruction Sheet II, PREPARING MERCHANIDSE FOR SHIPPING	
8	Set up the learning lab for student practice. Observe and assist students as they practice.	Packing materials: --Boxes --Packing materials --Address labels --Tape --Scissors --Vendor Return Form	
9	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.) --Packing materials --Vendor Return Form --Boxes --Address labels --Tape --Scissors	

STUDENT SELF-CHECK I

RETURNS TO VENDORS

ANSWERS

1. T
2. F
3. T
4. T
5. T
6. T
7. T
8. F

STUDENT SELF-CHECK II

VENDOR RETURN FORMS

ANSWERS

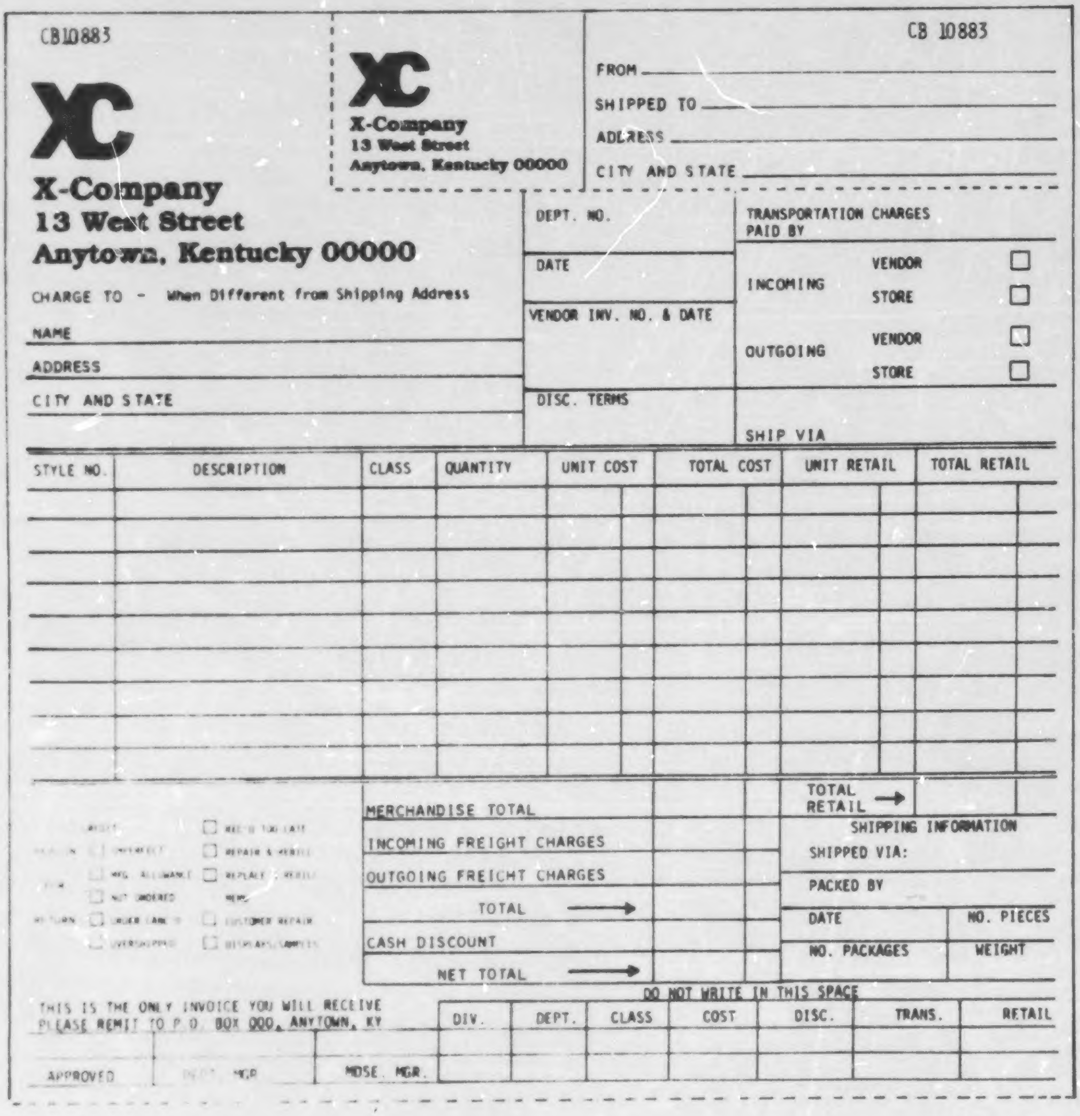
1. T
2. T
3. F
4. T
5. T
6. T

STUDENT SELF-CHECK III

RETURNING MERCHANDISE TO VENDORS

ANSWERS

1. T
2. T
3. T
4. F
5. T
6. T
7. F
8. T



CB10883

X-Company
13 West Street
Anytown, Kentucky 00000

CHARGE TO - When Different from Shipping Address

NAME
ADDRESS
CITY AND STATE

X-Company
13 West Street
Anytown, Kentucky 00000

CB 10883

FROM
SHIPPED TO
ADDRESS
CITY AND STATE

DEPT. NO.
DATE
VENDOR INV. NO. & DATE
DISC. TERMS

TRANSPORTATION CHARGES PAID BY
INCOMING VENDOR ☐
STORE ☐
OUTGOING VENDOR ☐
STORE ☐
SHIP VIA

STYLE NO.	DESCRIPTION	CLASS	QUANTITY	UNIT COST	TOTAL COST	UNIT RETAIL	TOTAL RETAIL

CREDIT
REASON FOR RETURN
☐ DEFECTIVE
☐ MFG. ALLOWANCE
☐ NOT ORDERED
☐ ORDER CANCELED
☐ OVERSHIPPED
☐ REC'D TOO LATE
☐ REPAIR & REBILL
☐ REPLACE & REBILL MDSE.
☐ CUSTOMER REPAIR
☐ DISPLAYS/SAMPLES

MERCHANDISE TOTAL
INCOMING FREIGHT CHARGES
OUTGOING FREIGHT CHARGES
TOTAL →
CASH DISCOUNT
NET TOTAL →

TOTAL RETAIL →

SHIPPING INFORMATION
SHIPPED VIA:
PACKED BY
DATE
NO. PIECES
NO. PACKAGES
WEIGHT

THIS IS THE ONLY INVOICE YOU WILL RECEIVE
PLEASE REMIT TO P.O. BOX 000, ANYTOWN, KY

APPROVED
DEPT. MGR
MDSE. MGR.

DO NOT WRITE IN THIS SPACE

DIV.	DEPT.	CLASS	COST	DISC.	TRANS.	RETAIL

BEST COPY AVAILABLE

TRANSFERRING MERCHANDISE TO BRANCH STORES

OBJECTIVE

Given a request for transfer of merchandise, a transfer form, and merchandise, transfer merchandise. Complete transfer data must be written on the transfer form, and the merchandise must be correctly prepared for transferring.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that large retail establishments with branch stores do need to cooperate to bring services and merchandise to their customers.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. HOW TO TRANSFER MERCHANDISE TO BRANCH STORES.....	1
Student Self-Check	
I. TRANSFERRING MERCHANDISE TO BRANCH STORES........	3
Instructor's Final Checklist	
TRANSFERRING MERCHANDISE TO BRANCH STORES...........	4

CHECK-OUT ACTIVITY

Your instructor will provide you with a request for merchandise that is to be sent to another store. Fill out an inter-store transfer form for this request and prepare the merchandise for transfer.

TRANSFERRING MERCHANDISE TO BRANCH STORES

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Transfer documents Instruction Sheet I, HOW TO TRANSFER MERCHANDISE TO BRANCH STORES	
2	Discuss and demonstrate in large or small groups how to inter-store transfer merchandise. Emphasize: --Filling out the inter-store transfer form. --Containerizing merchandise to be transferred. Suggestions: --Make a transparency of the inter-store transfer form for use on overhead projector.	--Copies of the INTER-STORE TRANSFER FORM. (A Master Copy in this section.) --Transparency film --Overhead projector --Marker for transparency	
3	Assist students in completing Student Self-Check I, TRANSFERRING MERCHANDISE TO BRANCH STORES.	Student Self-Check I, TRANSFERRING MERCHANDISE TO BRANCH STORES --Copies of the INTER-STORE TRANSFER FORM. (A Master Copy in this section.)	
4	Design a request for merchandise for this Check-Out Activity.	--Request for merchandise --Copies of the INTER-STORE TRANSFER FORM. (A Master Copy in this section.) --Merchandise --Shipping Containers --Packing Materials --Tape --Bags	

TRANSFERRING MERCHANDISE TO BRANCH STORES

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

TRANSFERRING MERCHANDISE TO BRANCH STORES

ANSWERS

A. Transfer Form: Ask your instructor to check the transfer form.

B. 1. a, b, c, d

2. a. (+)

b. (+)

c. (-)

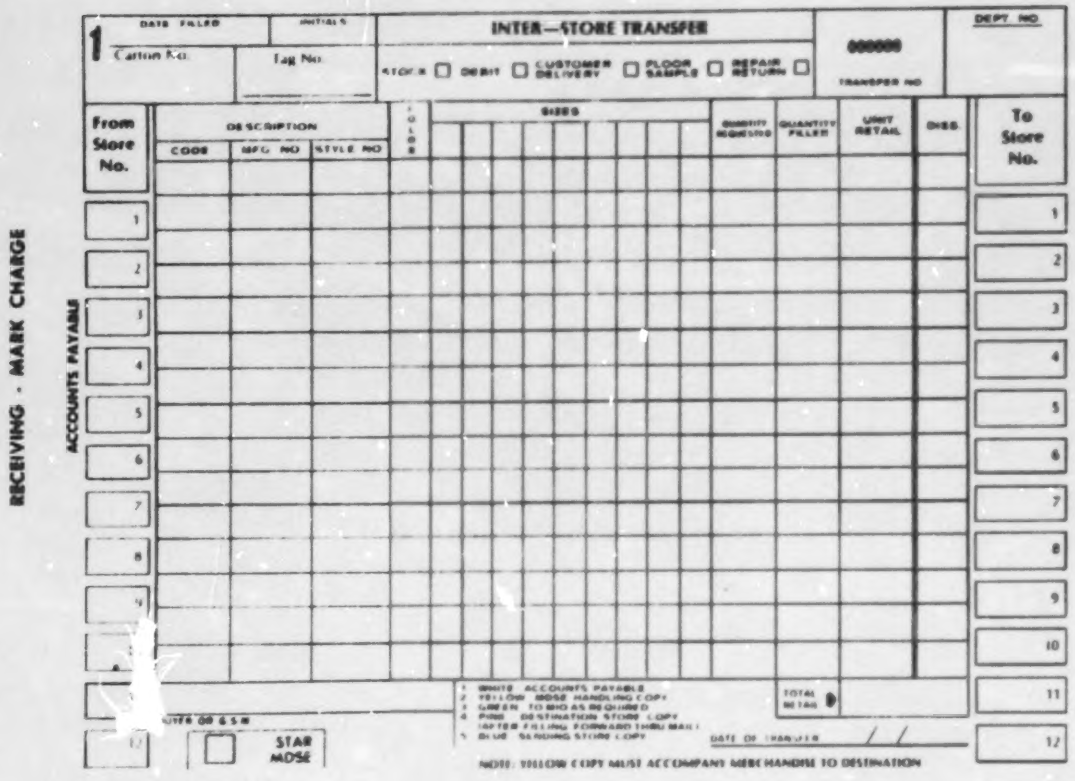
d. (+)

e. (-)

f. (+)

g. (+)

h. (+)



RECEIVING - MARK CHARGE

ACCOUNTS PAYABLE

1

DATE FILLED

INITIALS

Carton No.

Tag No.

INTER—STORE TRANSFER

STOCK ☐ DEBIT ☐ CUSTOMER DELIVERY ☐ FLOOR SAMPLE ☐ REPAIR RETURN ☐

000000

TRANSFER NO

DEPT NO

From Store No.	DESCRIPTION			COLOR	SIZES	QUANTITY REQUESTED	QUANTITY FILLED	UNIT RETAIL	DIFF.	To Store No.
	CODE	MFG NO	STYLE NO							
1										1
2										2
3										3
4										4
5										5
6										6
7										7
8										8
9										9
[illegible]										10
[illegible]										11
12										12

[illegible] BUYER OR G S M

☐ STAR MOSE

1 WHITE ACCOUNTS PAYABLE
2 YELLOW MOSE HANDLING COPY
3 GREEN TO MIO AS REQUIRED
4 PINK DESTINATION STORE COPY
(AFTER FILLING FORWARD THRU MAIL)
5 BLUE SENDING STORE COPY

TOTAL RETAIL ▶

DATE OF TRANSFER / /

NOTE: YELLOW COPY MUST ACCOMPANY MERCHANDISE TO DESTINATION

DESIGNING AND LETTERING SIGNS

OBJECTIVES

(1) Provided merchandise and three point-of-purchase sign request forms, write sign copy for the merchandise. The plan for the signs should include information that will benefit customers and a message that is brief, factual, and one that will attract the customer's attention.

(2) Given three articles of merchandise and access to show card lettering tools and supplies, letter show cards for the display. The show cards must be sized and color coordinated appropriately for the display. They should incorporate the principles of artistic design, and be informative and readable.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that advance planning will speed up the making of signs.
--Students will realize that importance of clean and neatly made signs.
--Students will realize that show cards can be used as "silent sales" aids.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I WRITING A SIGN REQUEST FORM	2
II TOOLS AND MATERIALS USED FOR SHOW CARD LETTERING	4
III SPACING SHOW CARD LETTERS	5
IV QUALITIES OF GOOD SHOW CARDS	6
V LETTERING THE GOTHIC ALPHABET AND NUMERALS	8
VI LETTERING THE ROMAN ALPHABET AND NUMERALS	9
Student Self-Checks	
I WRITING A SIGN REQUEST FORM	3
II SPACING SHOW CARD LETTERS	7
III LETTERING SHOW CARDS WITH GOTHIC LETTERS AND NUMERALS	9
IV LETTERING SHOW CARDS WITH ROMAN LETTERS AND NUMERALS	11
Instructor's Final Checklist	
DESIGNING AND LETTERING SIGNS	12

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with three articles of merchandise and three print shop sign request forms. Complete each of the show card requisitions.

(2) Your instructor will provide you with three articles of merchandise. Design and hand letter one show card using the Gothic alphabet and numerals, one show card using the Roman style letters and numerals, and one show card using the style of your choice.

SUGGESTED REFERENCES

George, Speedball Textbook for Pen and Brush Lettering, Hunt Manufacturing Co., Camden, New Jersey.

Samson, Little, Display Planning and Techniques, Southwestern Publishing Co., Cincinnati, Ohio.

Luter, Basic Visual Merchandising, University of Texas of Austin, 1982.

DESIGNING AND LETTERING SIGNS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Luter, Basic Visual Merchandising, "Merchandise Signing." Samson and Little, Display Planning and Techniques, p. 40. George, Speedball Textbook for Pen and Brush Lettering.	
2	Student Self-Check I	Student Self-Check I, KEY ELEMENTS OF A SIGN	
3	Arrange for the print shop supervisor to discuss print shop procedures with students in large groups. Discuss in small groups the information in this instruction sheet. Make a transparency of the sign request form for over-head projector use.	Instruction Sheet I, PLANNING SIGN COPY FOR PRINT SHOP Instruction Sheet II, WRITING A SIGN REQUEST FORM	
4	Discuss in small groups tools and materials used for showcard lettering.	Instruction Sheet III, TOOLS AND MATERIALS USED FOR SHOW CARD LETTERING	
5	Discuss and demonstrate in small groups how spacing of letters and numbers is done.	Instruction Sheet IV, SPACING SHOW CARD LETTERS	
6	Discuss and show examples of good show cards in small or large groups.	Instruction Sheet V, QUALITIES OF GOOD SHOW CARDS	
7	Student Self-Check II Evaluate student's performance.	Student Self-Check II, SPACING SHOW CARD LETTERS	

DESIGNING AND LETTERING SIGNS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
8	Discuss and demonstrate how to letter with the Gothic letters and numerals. Ask art instructor to help. Overhead projector will be useful.	Instruction Sheet VI, LETTERING THE GOTHIC ALPHABET AND NUMERALS	
9	Student Self-Check III Evaluate students' performance.	Student Self-Check III, LETTERING SHOW CARDS WITH GOTHIC LETTERS AND NUMERALS	
10	Discuss and demonstrate how to letter with Roman letters and numerals. Overhead projector will be useful.	Instruction Sheet VII, LETTERING THE ROMAN ALPHABET AND NUMERALS Overhead projector Screen	
11	Student Self-Check IV Evaluate students' performance.	Student Self-Check IV, LETTERING SHOW CARDS WITH ROMAN LETTERS AND NUMERALS	
12	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.) --Request form --Merchandise --Lettering tools and supplies	

STUDENT SELF-CHECK II

SPACING SHOW CARD LETTERS

ANSWERS

1. -
2. -
3. +
4. -
5. +
6. +

DESIGNING AND LETTERING SHOW CARDS

FRAME 1

Retailers use show cards to help sell merchandise. Effective show cards perform as "silent sales aids" by informing customers of present and future sales, giving them directions, product information and prices. The effective show card is easy for the customers to read. It attracts their attention, contains informative copy, is artistically pleasing, and assists in selling merchandise. This slide-tape presentation is designed to show you how to hand design and letter show cards.

FRAME 2

First prepare the card stock for the signs that you plan to hand letter. Using a double full sheet of show card stock that measures 28 inches by 44 inches, line it so that you will have

FRAME 3

one full sheet that measures 28 inches x 22 inches,

FRAME 4

one half sheet that measures 14 inches x 22 inches,

FRAME 5

one quarter sheet that measures 14 inches x 11 inches, and

FRAME 6

four one-eighth sheets that measure 7 inches x 11 inches.

FRAME 7

Your double full sheet will look like this one.

FRAME 8

Carefully cut the double full sheet of card stock on a cutting board.

FRAME 9

Align the measured lines with the cutting edge of the board. Observe the location of the non-cutting hand.

FRAME 10

After you prepare the card stock, read the show card requisition. The request for show cards usually comes from a department manager, buyer, or salesperson. The requisition will give you the following information:

- -the number of show cards that are needed,
- -the size of the requested show card,
- -the requested copy,
- -suggestions for illustrations, and
- -colors to be used

FRAME 11

Make a sketch of the show card. Your sketch will serve as a plan for the final copy. Include in your sketch the copy and the illustration.

FRAME 12

A 14 inch by 22 inch half sheet show card has been requested. Using the penciled sketch as a guide, lightly line the final copy card stock.

FRAME 13

Again, using the penciled sketch as a guide, lay-out the show card copy with a pencil. First sketch the head line of the copy.

FRAME 14

Next, pencil the sub-headings.

FRAME 15

Pencil the illustration.

FRAME 16

Check the penciled show card with the requisition to determine that each word is correctly spelled, and that the lay-out is artistically pleasing and that the requested copy is on the card stock.

FRAME 17

Assemble the tools and materials for lettering the show card. You will need:

-Poster paints

-Appropriate size brushes

-India ink

-Pens

-Artist pallette

-Soft rubber artists eraser

-Container of clear water for washing brushes and pens

-Yard stick

-Show card sketch

FRAME 18

Select an appropriate size lettering brush.

FRAME 19

As you pull each stroke of the letters and numerals, let the forearm of your drawing arm rest comfortably on the drawing board. This is a relaxing position.

FRAME 20

Fill your brush with paint from the pallette, but do not overload it. A full brush will help you pull letters and numerals that are equal in thickness and color. Flair your brush as you pull each stroke. Do not use a brush that has broken, misshapened or out-of-place bristles.

FRAME 21

Pull the strokes toward you.

FRAME 22

Fill the brush often to allow you to create the desired full and even strokes.

FRAME 23

To avoid leaving excess paint at the end of a stroke, pick up the brush immediately after completing a stroke.

FRAME 24

Using the forementioned procedures you will create a headline similiar to this one.

FRAME 25

Wash the brush immediately after use if you are going to change to another one. Place it on a flat surface to dry.

FRAME 26

Select a brush size that is appropriate to the width of letters and numerals that you wish to create. What style of lettering is this artist using? If you said, "Gothic," you are correct.

FRAME 27

Using the new brush, pull the thinner strokes to form the second line of copy.

FRAME 28

If you must touch up strokes do so very carefully. Why would different size letters be used for the second line of copy? If you said to highlight the headline of the copy you are right.

FRAME 29

Pull the Gothic numeral strokes exactly as you pull the letter strokes. Remember, fill the brush but do not over-fill it, while you pull the strokes.

FRAME 30

Complete the strokes of the numeral.

FRAME 31

You can select another size of brush for the next line of copy if you wish.

FRAME 32

Lines of emphasis can be added to highlight copy.

FRAME 33

When finished, the lines of emphasis should have the balanced margins, as are illustrated in this slide.

FRAME 34

Clean brushes immediately after you finish using them. Lay them on a flat surface to dry.

FRAME 35

You can use different medium on the same show card if you desire to give the card interest. This artist has elected to use india ink for the last line of copy.

FRAME 36

After filling the pen with ink, pull each stroke as you did with the brush. For convenience sake, the ink should be close to you.

FRAME 37

Each letter of the final line of copy is pulled until completed.

FRAME 38

If desired, indian ink can be used for outlining the illustration.

FRAME 39

Lines of emphasis can be added to highlight the illustration.

FRAME 40

Before erasing penciled sketch lines with a soft rubber artist eraser check to determine that the paint and ink are dry.

FRAME 41

Brush off the residue left by the eraser. Do not use your hands as the oil in the palm of your hand may smear the paint of the copy or it may leave oily spots on the cardstock - so what do they use?

FRAME 42

If desired, you may color the illustration, as this artist has elected to do. A felt tip marker is used to color the illustration.

FRAME 43

White space has been left to give the car a three dimensional effect.

FRAME 44

You may also elect to color the interior of the illustration.

FRAME 45

Check the finished show card to determine that it meets the specifications of the requisition.

FRAME 46

This show card does meet the following specifications:

- the requested copy is on the show card,
- all words are spelled correctly,
- colors will help attract the attention of the customers,
- it is artistically pleasing,
- copy and illustration are balanced,
- sufficient white space has been left to make the copy easy to read,
- the illustration and copy compliment each other, and
- the show card is clean and when it is appropriately displayed in the store, it will serve its purpose as a "silent sales aid."

FRAME 47

After completing the show card, clean your tools, straighten the brush bristles, cap the paints, and store your materials, equipment, and tools properly.

FRAME 48

The End.

SIGN REQUEST FORM

Date Requested ____________________ Date Needed ____________________

Company ____________________ Department ____________________

Address ____________________ ____________________

____

Description

Sign No.	Quantity	Size	Paper		Lettering Style
			Weight	Color	
1					
2					
3					
4					

Copy for Individual Signs

Sign No. 1	Sign No. 2
Sign No. 3	Sign No. 4

Signature of Requestor ______________________________ Date ____________

SETTING UP DISPLAYS

OBJECTIVE

Provided merchandise, display space, display tools, and equipment, plan and set up a display. The finished display must meet all applicable criteria on the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that displays do aid retailers in showing what merchandise they have to offer.
--Students will realize that merchandise usually must be seen before it is sold.
--Students will realize that displays are only one way to show merchandise.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I PRINCIPLES OF DISPLAY DESIGN	1
II STEPS IN PLANNING A DISPLAY	5
III SAFETY STANDARDS FOR DISPLAYS	8
IV SETTING UP A DISPLAY..........................	11

Student Self-Checks	
I PRINCIPLES OF DISPLAY DESIGN	4
II PLANNING A DISPLAY	7
III SAFETY STANDARDS FOR DISPLAYS..................	10

Instructor's Final Checklist	
SETTING UP DISPLAYS	14

CHECK-OUT ACTIVITY

Your instructor will give you merchandise, display space, display tools, and equipment. Set up a display.

SUGGESTED REFERENCES

Luter, Basic Visual Merchandising, University of Texas at Austin, 1982.
Samson and Little, Display Planning and Techniques, South-Western Publishing Co., Cincinnati, Ohio, 1979.
Smith, Display and Promotion, Gregg/McGraw-Hill Book Co., Saint Louis, 1978.

SETTING UP DISPLAYS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, PRINCIPLES OF DISPLAY DESIGN	
2	Discuss with students the following topics: --Purposes of displays --Artistic principles for setting up displays --It is helpful-to use slides of local store displays to illustrate discussions.	--Slides of local store displays --Slide projector --Slide/tape presentation, R-24-A, "Displays" Filmstrip: "In-Store Advertising Techniques," Singer, filmstrip and cassette.	
3		SUGGESTED REFERENCES Samson and Little, Display Planning and Techniques, "Display Concepts," Smith and Dorr, Display and Promotion, "Understanding Design Elements" Student Self-Check I, PRINCIPLES OF DISPLAY DESIGN	
4		--An Answer Key is provided in this section of the manual.	
5		Instruction Sheet II, STEPS IN PLANNING A DISPLAY	

SETTING UP DISPLAYS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Discuss and demonstrate for students "How to Plan an Effective Display." (A planning form is included in the module.) Discuss and show examples of kinds of displays i.e. counter, mass, manufacturer's, etc.	--Copies of the Display Planning Form	
7	Help students to plan a display.	--Copies of Student Self-Check II, PLANNING A DISPLAY --Answer Key included in this section	
8		--Copies of Instruction Sheet II, SAFETY STANDARDS FOR DISPLAYS are needed	
9	Discuss "Safety Standards for Displays." Show slides of displays that illustrate these standards.	--Slides of displays that illustrate safety standards --Luter, Basic Visual Merchandising	
10		--Copies of Student Self-Check II, SAFETY STANDARDS FOR DISPLAYS --An Answer Key is included in this section.	
11		--Copies of Instruction Sheet IV, SETTING UP A DISPLAY	

SETTING UP DISPLAYS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
12	Discuss with students "How to Set Up a Display." Demonstrate how to set up displays. Emphasize: --Using plans and safety Use Slide/Tape Presentation: R-24 for illustrating discussion.	--Slide/tape presentation R-24, "Setting up Displays" --Slide/tape machine	
13	Approve students' display plans before they begin to set it up. Observe as students practice: --Safety --Construction Have students hand letter show cards for display. Take photographs of student built displays on class bulletin board.	--Display plan form is included in this section --Merchandise --Display props --Show card lettering supplies --Display space --Display accessories --Camera --Film	
14	Approve students' display plans before they begin. Have students hand letter show cards. Use the Instructor's Final Checklist to evaluate each student's performance. Take photographs of student built display for displaying on class bulletin board.	--Display planning forms included in this section --Merchandise --Display props --Show card lettering supplies --Display accessories --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of this manual. --Camera --Film	

DISMANTLING AND SETTING UP DISPLAYS

FRAME 1

Salespeople and stock clerks are often requested to dismantle and set up merchandise displays by their supervisors. This slide-tape presentation is designed to show you how to dismantle and set up one kind of display-the table top. These same steps can be used to dismantle and set up other kinds of displays.

FRAME 2

After a department manager and the salespeople who are assigned to set up a display have discussed plans for the new display, an existing display is usually dismantled to make space for the new one. Dismantling a display is done by reversing the steps of setting up a display. Display signs are first removed.

FRAME 3

Next, merchandise is carefully removed and

FRAME 4

returned to storage or it may be replaced in stock on the sales floor.

FRAME 5

After the merchandise, signs and display accessories have been removed from the display, the decorative props are either removed or adjusted in preparation for the next display.

FRAME 6

When the next display to be set up requires accessories, these are prepared as the display set up continues.

FRAME 7

Next, the merchandise to be included in the new display is assembled and prepared for display.

FRAME 8

Display accessories are selected and

FRAME 9

the setting up of the new display begins. The display backdrop is placed in position.

FRAME 10

Display accessories are added, in this situation they are related items sold by another department in the store.

FRAME 11

After the display accessories have been positioned, the merchandise to be featured in the display is added.

FRAME 12

The featured merchandise is carefully placed to create a visual picture of balance and harmony throughout the total display.

FRAME 13

Featured merchandise is placed into position until each item has been displayed as planned.

FRAME 14

Periodically, the display is visually evaluated to determine that it is balanced and that the merchandise has been set up to create a pleasing visual presentation to the customers.

FRAME 15

Additional display accessories are placed into position.

FRAME 16

Adjustments to the display are made.

FRAME 17

The department manager may make some final adjustments to the display.

FRAME 18

The finished display, isa sales aid used for showing customers featured and related merchandise, and for giving them ideas about how to use the items.

FRAME 19

The End.

STUDENT SELF-CHECK I

PRINCIPLES OF DISPLAY DESIGN

ANSWERS

1. K
2. A
3. I
4. C
5. E
6. H
7. B
8. L
9. F
10. D
11. G
12. J

STUDENT SELF-CHECK III

SAFETY STANDARDS FOR DISPLAYS

ANSWERS

1. +
2. -
3. -
4. +
5. +
6. -
7. +
8. -

CHECK-OUT ACTIVITY

SETTING UP A DISPLAY

You have learned the characteristics and purposes of a displays. You have learned the safety hazards to avoid and you have learned the process of planning and setting up a display. You are now ready to plan and set up a display. Write your plans on the following planning sheet. Ask your instructor to check them. Collect the merchandise, materials, tools, and accessories and set up the one that you have planned.

MY PLANS FOR A DISPLAY

The theme or purpose(s) of my display is: ____________________

____

I will need the following tools, materials, and merchandise:

____ ____ ____ ____

____ ____ ____ ____

I plan to place this display (store location): ____________________

____

Before setting up the display, I will have to do the following activities:

I plan to place the following show cards, price cards and/or signs on or near the display:

CHECK-OUT ACTIVITY, (page 2)

SETTING UP A DISPLAY

My completed display will look like the following sketch.

I will do the following activities when setting up the display. (List, in order, the activities that you will do from start to finish.) Include safety precautions that you will observe.

____

____

____

____

____

____

Ask your instructor to check your plans. When your plans are approved, set up the display.

DRESSING MANNEQUINS

OBJECTIVE

Provided a mannequin, clothing, accessories, tools, and equipment, dress the mannequin. The mannequin must be dressed and accessorized appropriately without damaging any of its parts or the merchandise.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that displayed merchandise must be protected if it is to be resold after being displayed.

--Students will realize that displayed merchandise must be presented cleanly, neatly and in its best environment if it is to attract customers' attention.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I MANNEQUINS: A VERY IMPORTANT DISPLAY............	3
II DRESSING A MANNEQUIN............................	4
Student Self-Check	
I DRESSING A MANNEQUIN..............................	8
Instructor's Final Checklist	
DRESSING MANNEQUINS..................................	9

CHECK-OUT ACTIVITY

Your instructor will provide you with a mannequin, tools, and materials, clothing, and accessories. Dress the mannequin.

SUGGESTED REFERENCES

Luter, Basic Visual Merchandising, The University of Texas at Austin, Austin, Texas, 1982.

Samson, Little, Display Planning and Techniques, South-Western Publishing Co., Cincinnati, 1979.

Smith, Display and Promotion, Gregg/McGraw-Hill Book Co., St. Louis, 1978.

DRESSING MANNEQUINS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Smith and Dorr, Display and Promotion, pp. 83-85. Luter, Basic Visual Merchandising, "Effective Use of Mannequins." Samson, Little, Display Planning and Techniques, "Mannequins."	
2	Discuss in small or large groups the information in this Instruction Sheet.	Instruction Sheet I, MANNEQUINS: A VERY IMPORTANT DISPLAY	
3	Discuss in small groups the information in this Instruction Sheet.	Instruction Sheet II, DRESSING A MANNEQUIN	
4	Demonstrate for students how to dismantle and assemble mannequin. Observe students as they practice. Help them. Demonstrate for students how to dress and accessorize mannequins. Observe students as they practice. Help them.	--Mannequin and tools, if needed for dismantling --Plastic bag for protecting mannequin wig --Mannequin --Clothing --Accessories --Tools if needed for dismantling	
5	Set up mannequins for students to use.	--Mannequins --Clothing and accessories	
6	Help students who need assistance in dressing a mannequin. Observe as students practice.	Student Self-Check I, DRESSING A MANNEQUIN	

DRESSING MANNEQUINS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7		--Mannequins --Clothing --Accessories	
	Use the Instructor's Final Checklist to evaluate the student's performance.	--Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of of the manual.)	

SETTING UP AND DISMANTLING WINDOW DISPLAYS

OBJECTIVE

Given a theme for a window display, merchandise, display accessories, and tools: plan, set up, and dismantle a window display. The display must be appropriate for the theme; show cards and price cards should fit the theme; principles of design should be incorporated; and the display should be safely and appropriately dismantled.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will realize that displays assist in creating a store's image.
--The students will realize that displays which are set up according to the principles of artistic design will enhance a store's image.
--The students will realize that one of the major objectives of displays is to assist in selling merchandise.
--The students will realize that displays are "silent" sales aids.
--The students will realize that display supplies are expensive and if they dismantle without damaging props and merchandise, money has been saved.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I PLANNING AND SETTING UP AN EFFECTIVE WINDOW DISPLAY . . .	3
II SETTING UP A WINDOW DISPLAY	5
III DISMANTLING DISPLAYS	8
Student Self-Checks	
I SETTING UP WINDOW DISPLAYS	4
II WINDOW DISPLAY CHECKLIST	7
III PLANNING TO DISMANTLE DISPLAYS	9
Instructor's Final Checklist	
SETTING UP AND DISMANTLING WINDOW DISPLAYS	10

CHECK-OUT ACTIVITY

Your instructor will provide a theme for a window display. After you obtain the necessary supplies you will plan, build, and dismantle the display.

SUGGESTED REFERENCES

Smith, Display and Promotion, Gregg/McGraw-Hill, Saint Louis, 1978.
Samson and Little, Display Planning and Techniques, South-Western, Cincinnati, 1979.

SETTING UP AND DISMANTLING WINDOW DISPLAYS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Smith, Display and Promotion, pp. 29-37, 41-49, 55-60. Luter, "Basic Visual Merchandising, "Elements of Window Display"	
2	Discuss in large or small groups how to plan set up and dismantle window displays. Discuss principles of display.	SUGGESTED RESOURCE Transparency masters are included in this section. Planning form is included in this section.	
3	Show slides of local stores' effective window displays. Discuss why they are effective.	Instruction Sheet I, PLANNING AND SETTING UP AN EFFECTIVE WINDOW DISPLAY. Slides and projector	
4	Assist students with Student Self-Check I.	Student Self-Check I, SETTING UP WINDOW DISPLAYS. --An Answer Key is provided in this section of the manual.	
5		Instruction Sheet II, SETTING UP A WINDOW DISPLAY.	
6	Discuss and demonstrate how to set up an effective window display. Emphasize: --Safety --Pre-planning --Signing --Principles of display	Window display materials: --Merchandise --Signs --Accessories --Mannequins --Housekeeping materials	

SETTING UP AND DISMANTLING WINDOW DISPLAYS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Assist students as they practice setting up window displays. Observe closely to determine that students follow safety procedures. Evaluate students display plan before they begin to set them up.	--Display tools and materials --Merchandise --Signing materials --Student Self-Check II, WINDOW DISPLAY CHECKLIST. (A Master Copy is provided in this section of the manual.)	
8		Instruction Sheet III, DISMANTLING DISPLAYS.	
9		Student Self-Check III, PLANNING TO DISMANTLE DISPLAYS.	
10	Use Instructor's Final Checklist to evaluate each student's performance. Check student's plans before beginning Check-Out Activity.	--Display tools and materials --Merchandise --Display space --Display planning forms --Signing materials --Copies of the Instructor's Final Checklist, SETTING UP AND DISMANTLING WINDOW DISPLAYS. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

SETTING UP WINDOW DISPLAYS

ANSWER KEY

1. a
   b
   c
   d
   e
   f
   g

2. a
   b
   c
   d
   e
   f

3. a

4. a, b, c, d, e, f, g, h, i, j, k, l, m, n, o, p, q, r, s, t, u, v, w

CHECK-OUT ACTIVITY

SETTING UP A DISPLAY

You have learned the characteristics and purposes of a displays. You have learned the safety hazards to avoid and you have learned the process of planning and setting up a display. You are now ready to plan and set up a display. Write your plans on the following planning sheet. Ask your instructor to check them. Collect the merchandise, materials, tools, and accessories and set up the one that you have planned.

MY PLANS FOR A DISPLAY

The theme or purpose(s) of my display is: ________________________________

____

I will need the following tools, materials, and merchandise:

_____ _____ _____ _____

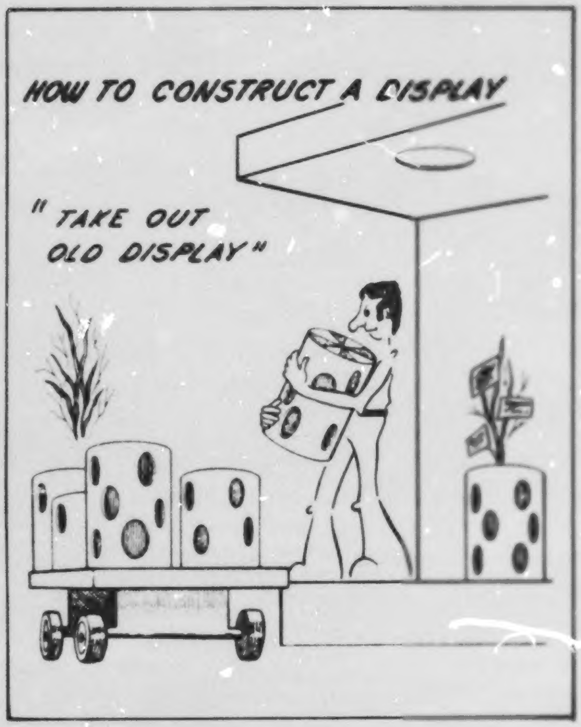
_____ _____ _____ _____

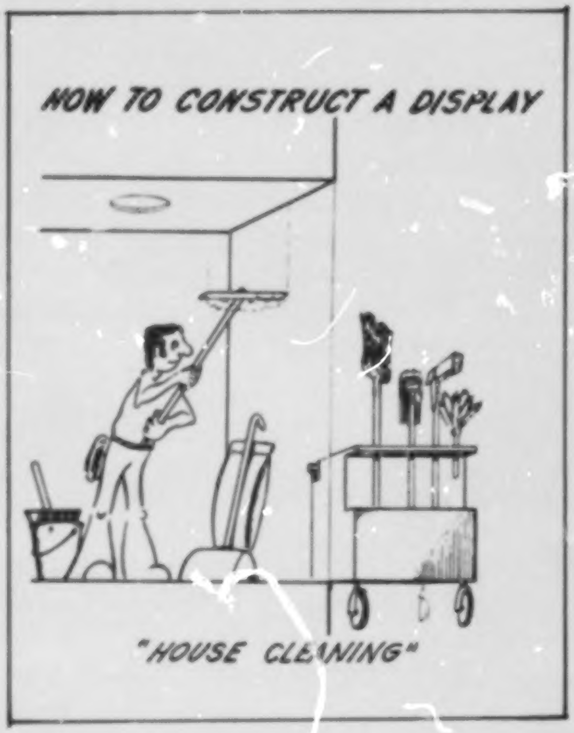
I plan to place this display (store location): ____________________________

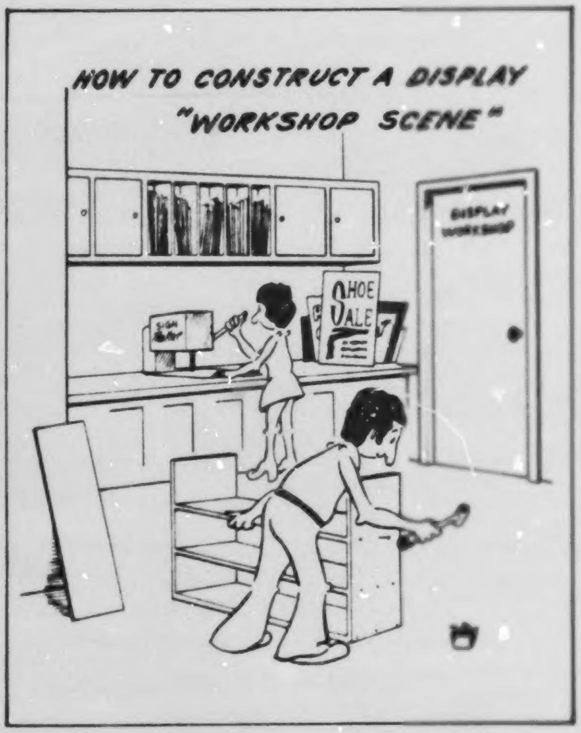
____

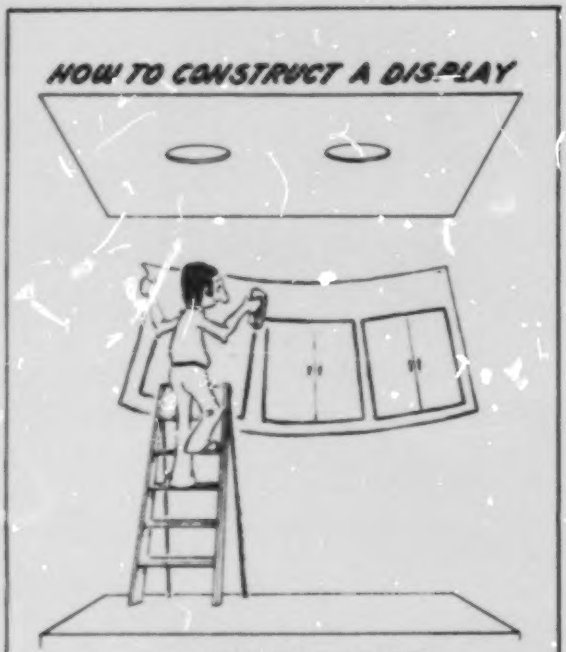
Before setting up the display, I will have to do the following activities:

I plan to place the following show cards, price cards and/or signs on or near the display:

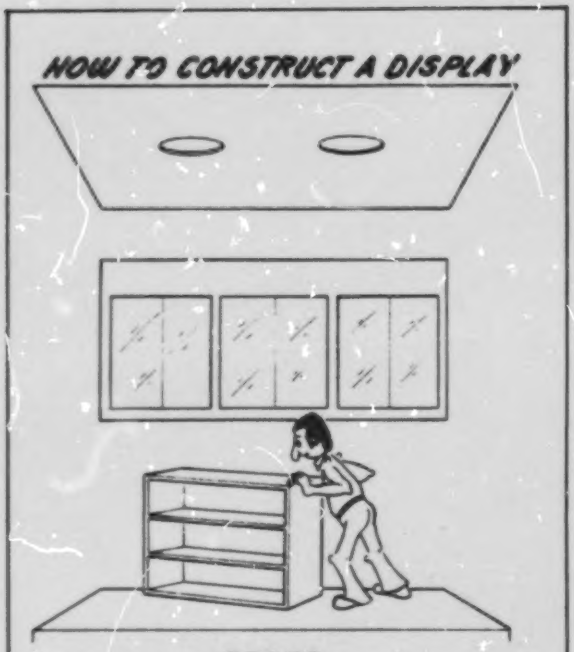

HOW TO CONSTRUCT A DISPLAY
"TAKE OUT OLD DISPLAY"


HOW TO CONSTRUCT A DISPLAY
"HOUSE CLEANING"

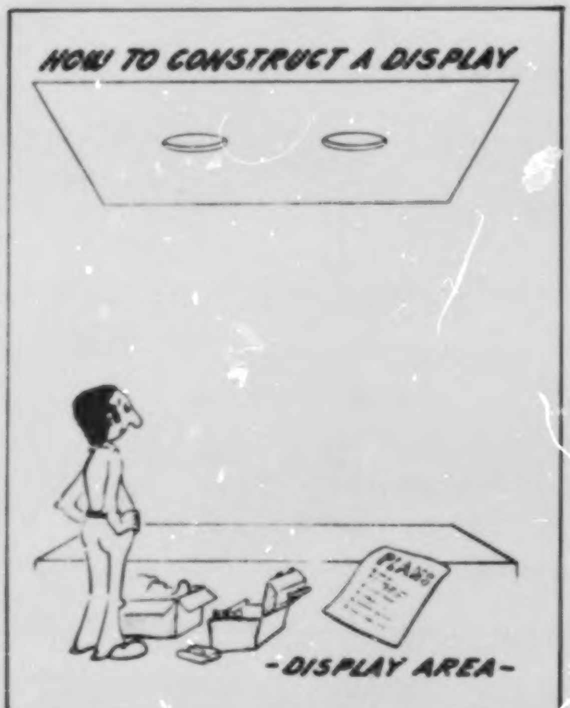

HOW TO CONSTRUCT A DISPLAY
"WORKSHOP SCENE"
DISPLAY WORKSHOP
SHOE SALE


HOW TO CONSTRUCT A DISPLAY

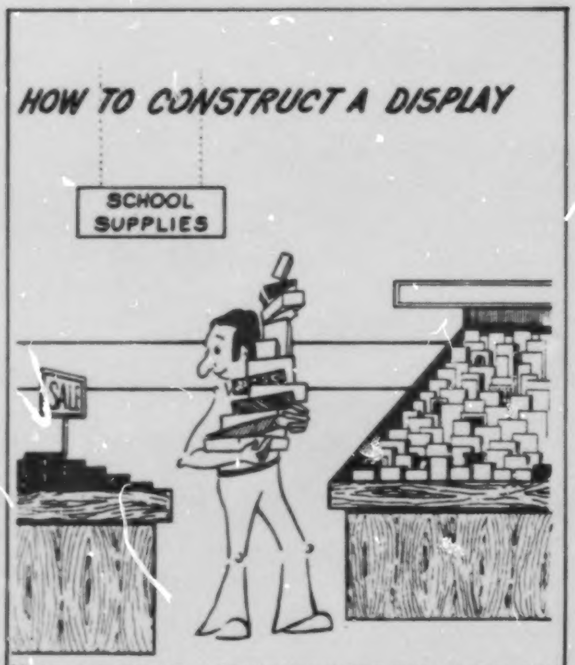
-BACKGROUND-


HOW TO CONSTRUCT A DISPLAY

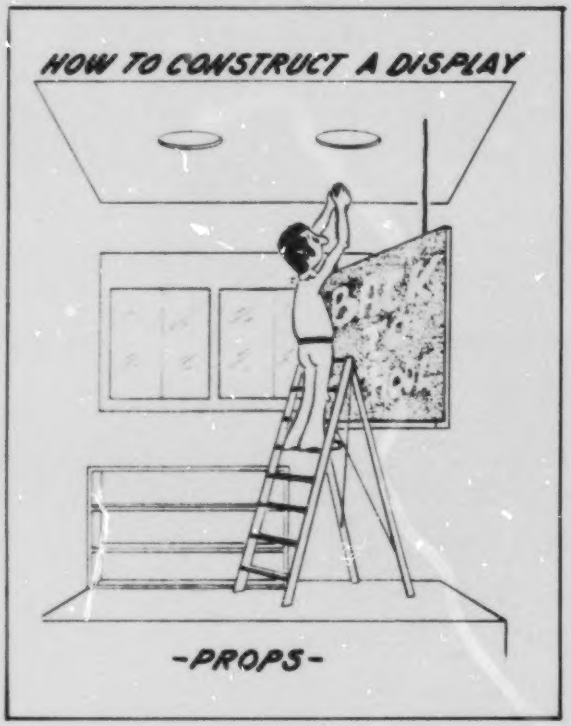
-PROPS-


HOW TO CONSTRUCT A DISPLAY
PLANS

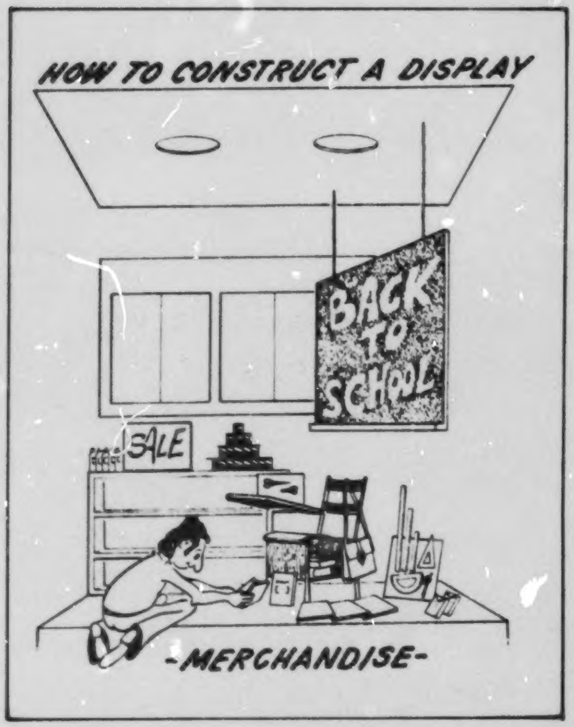
-DISPLAY AREA-


HOW TO CONSTRUCT A DISPLAY
SCHOOL SUPPLIES
SALE

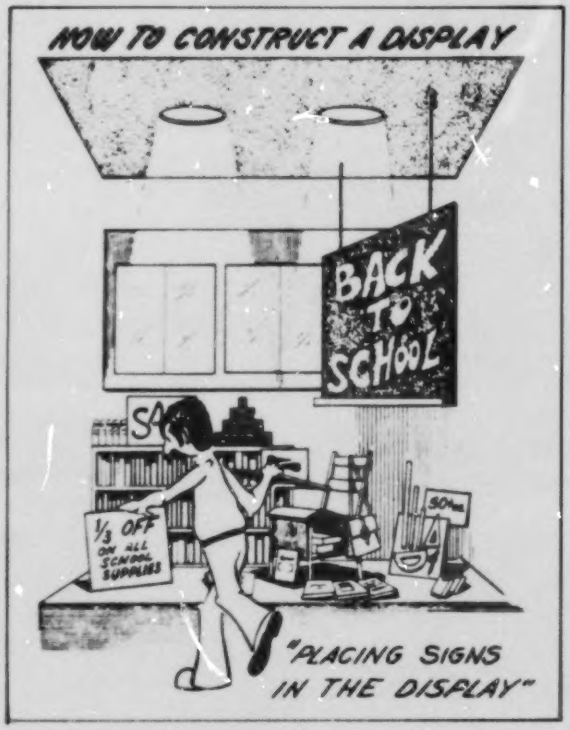
"COLLECTING MERCHANDISE FOR DISPLAY"


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL

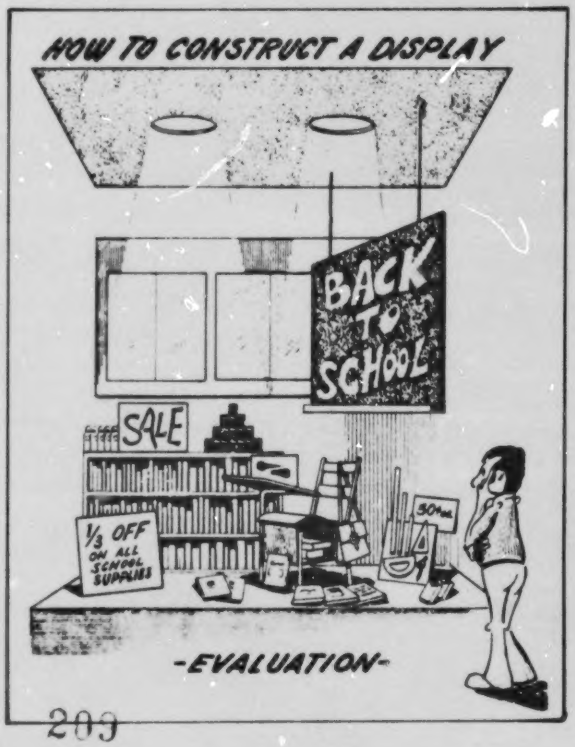
-PROPS-


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SALE

-MERCHANDISE-


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SALE
1/3 OFF ON ALL SCHOOL SUPPLIES
50¢

"PLACING SIGNS IN THE DISPLAY"


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SALE
1/3 OFF ON ALL SCHOOL SUPPLIES
50¢

-EVALUATION-

OPENING AND CLOSING THE STORE

OBJECTIVE

Given a list of activities that are performed when opening and closing a store, identify the ones performed when opening and those that are performed when closing. You should identify these activities with 90% accuracy.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

-- Students will realize the importance of security to a retailer.
-- Students will appreciate the importance of the security tasks.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I OPENING THE STORE.............................	1
II PREPARING THE DEPARTMENT FOR DAILY BUSINESS.....	3
III PREPARING THE CASH REGISTER CASH DRAWER.........	6
IV CLOSING THE DEPARTMENT..........................	7
Student Self-Checks	
I OPENING THE STORE.............................	2
II PREPARING THE DEPARTMENT FOR DAILY BUSINESS.....	5
III CLOSING THE DEPARTMENT..........................	8
Instructor's Final Checklist	
OPENING AND CLOSING THE STORE........................	11

CHECK-OUT ACTIVITY

Your instructor will give you a list of activities that are performed when opening and closing a store or department. Identify each according to the written instructions.

OPENING AND CLOSING THE STORE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss the information in Instruction Sheet I in small or large groups.	Instruction Sheet I, OPENING THE STORE.	
2	Help students who have problems with this Self-Check.	Student Self-Check I, OPENING THE STORE. --An Answer Key is provided in this section of the manual.	
3	Discuss the information in Instruction Sheet II in small or large groups.	Instruction Sheet II, PREPARING THE DEPARTMENT FOR DAILY BUSINESS.	
4			
5	Help students who have problems with this Self-Check.	Student Self-Check II, PREPARING THE DEPARTMENT FOR DAILY BUSINESS. --An Answer Key is provided in this section of the manual.	
6	Discuss information in Instruction Sheet III in small or large group. Emphasize accuracy of counting change fund.	Instruction Sheet III, PREPARING THE CASH REGISTER CASH DRAWER. SUGGESTED RESOURCE Filmstrip: "Preparing A Cash Drawer For Business," Singer, Filmstrip/cassette. SUGGESTED REFERENCES Stull, MARKETING MATH, South-Western, pp. 124-126. Doehring, CHECKER-CASHIER, South-Western, p. 105.	

OPENING AND CLOSING THE STORE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Discuss or arrange for a local store manager to discuss in large or small groups the activities that are to be performed by salespeople when a department is closed at the end of a business day.	Instruction Sheet IV, CLOSING THE DEPARTMENT.	
8	Assist students with Student Self-Check III.	Student Self-Check III, CLOSING THE DEPARTMENT. --An Answer Key is provided in this section of the manual.	
9	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Check-Out Activity Sheet. (A Master Copy and Answer Key are included in this section.) --Copies of the Instructor's Final Checklist, OPENING AND CLOSING THE STORE. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

OPENING THE STORE

ANSWERS

If you placed the store opening activities in the following order, you have an understanding of how to open a store.

--Observe the outside area of store for forced entry.
--Unlock the store entrance and turn off alarm system.
--Do not admit any unauthorized people into store.
--Lock the entrance and proceed with other assigned activities.
--Turn on the operational lights.
--Adjust the thermostat.
--Observe the inside of store for forced entry.
--Check the windows and doors in the store and warehouse.
--Proceed to the department opening activities.
--Open the employee entrance at the time established by manager.

STUDENT SELF-CHECK II

PREPARING THE DEPARTMENT FOR DAILY BUSINESS

ANSWERS

You should have checked each of these department opening activities with the exception of number 9. This activity is done when closing the department at the end of a business day.

STUDENT SELF-CHECK III

CLOSING THE DEPARTMENT

ANSWERS

2. Check the department for fire hazards.
3. Lock the security display areas.
4. Straighten the merchandise.
5. Return misplaced merchandise to the appropriate display space.
6. Clear the cash register.
7. Take the cash receipts to the designated store employee.
8. Do general housekeeping activities.
9. Turn off the department lights and turn on the security lights.
10. Lock up all mechandise that is designated as security items.
11. Write a list of items needed by the department from the stockroom warehouse
12. Empty all trash containers into designated containers.

CHECK-OUT ACTIVITY SHEET

OPENING AND CLOSING THE STORE

Directions: Listed below are activities that you may be expected to perform when opening the store or your department and when closing the store or your department. Number your paper from 1-25. Write an "O" (for opening) each of the opening activities and a "C" (for closing) for each of the closing activities. You will be graded according to the procedure established by your instructor.

1. Observe the outside area of the building for signs of forced entry during closed hours.
2. Unlock the store entrance.
3. Adjust the thermostat.
4. Turn off the alarm system.
5. Turn on the designated operational lights.
6. Balance the cash register.
7. Clear the cash register.
8. Turn off the electrical appliances.
9. Open the employee entrance at time established by manager.
10. Check inside of store for signs of entry.
11. Lock the entrance to store.
12. Turn off the security lights.
13. Obtain the change fund for the cash register.
14. Write a list of items that are needed in the department.
15. Straighten the merchandise.
16. Check to determine that the department is clean.
17. Restock the supply of bags, wrapping paper and business forms if needed.
18. Clean the glass surfaces of the display cases.
19. Pick up any observed trash.
20. Replace the missing price tags.

CHECK-OUT ACTIVITY SHEET, (page 2)

21. Lock the security display cases.
22. Check to determine that everyone has left department.
23. Take all money from the cash register and turn it in to designated store employee.
24. Remove all damaged merchandise from displays.
25. Turn off the operational lights and turn on the security lights.

CHECK-OUT ACTIVITY SHEET

OPENING AND CLOSING THE STORE

ANSWERS

1. O
2. O
3. O
4. O
5. O
6. C
7. C
8. C
9. O
10. O
11. O-C
12. O
13. O
14. O-C
15. O
16. O-C
17. O
18. O
19. O-C
20. O
21. C
22. C
23. C
24. O-C
25. C

OPERATING THE ELECTRONIC CASH REGISTER

OBJECTIVES

(1) Provided an electronic cash register and priced merchandise, correctly register each entry and obtain a correct total.

(2) Provided an electronic cash register and rolls of register tape, change the tape on the register. A clean and clear image should appear on the new tape and it should properly feed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will realize that efficient operation of the electronic cash register will help them best serve the customers.

--The students will realize that the touch system of operating the electronic cash register is the fastest and most efficient method of operation.

CONTENTS OF MODULE

Instruction Sheets		Learning Activity Number
I	THE KEYS OF A TYPICAL ELECTRONIC CASH REGISTER . .	3
II	LEARNING THE HOME KEYS OF AN ELECTRONIC CASH REGISTER	6
III	LEARNING THE THUMB GROUP OF KEYS	7
IV	LEARNING THE SECOND FINGER GROUPS OF KEYS	8
V	LEARNING THE INDEX FINGER GROUP OF KEYS	9
VI	LEARNING THE THIRD FINGER GROUP OF KEYS	10
VII	CHANGING THE CASH REGISTER RECEIPT TAPE	14
Student Self-Checks		
I	THE KEYS OF THE ELECTRONIC CASH REGISTER	5
II	USING THE TOUCH SYSTEM ON A ELECTRONIC CASH REGISTER	11
Instructor's Final Checklist		
	OPERATING THE ELECTRONIC CASH REGISTER	17

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you an electronic cash register and orders of merchandise. Ring up the orders of merchandise.

(2) Your instructor will provide you with an electronic cash register that is out of customer receipt tape and a new tape. Put the new roll of tape into the cash register.

OPERATING THE ELECTRONIC CASH REGISTER

SUGGESTED REFERENCE

Ditzenberger, Kidney, *Selling, Helping Customers' Buy*, South-Western Publishing Company, Cincinnati, 1981.

OPERATING THE ELECTRONIC CASH REGISTER

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Write to manufacturer of your specific electronic cash register for instructional materials that are keyed to your specific brand and model.	Ditzenberger, Kidney, and Selling, Helping Customers Buy, "Cash Register Operation and Handling Money,"	
2	SPECIAL NOTE: You should, emphasize that electronic cash registers have different placement of transaction keys. Key your discussion to your electronic register. Emphasize: --Touch system should be used to quickly serve customers --Accuracy --Honesty --Practice Use blank key board form to help students learn placement of keys. A slide-tape presentation R-28 "Introduction To Cashering" can be used to show kinds of cash registers	--A Master Copy of this key board form is included in this section R-28, Introduction To Cashering --Slide-tape presentation: R-28, Introduction To Cashering	
3		Instruction Sheet I, THE KEYS OF A TYPICAL ELECTRONIC CASH REGISTER	
4	Discuss and demonstate your electronic cash register keys. Emphasize: --Home key hand and finger placement		

OPERATING THE ELECTRONIC CASH REGISTER

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Student Self-Check	Student Self-Check I, THE KEYS OF AN ELECTRONIC CASH REGISTER.	
6	Observe as students practice. Assist when needed.	Instruction Sheet II, LEARNING THE HOME KEYS OF AN ELECTRONIC CASH REGISTER.	
7	Observe as students practice. Assist when need is indicated.	Instruction Sheet III, LEARNING THE THUMB GROUP OF KEYS	
8	Observe as students practice. Assist when need is indicated.	Instruction Sheet IV, LEARNING THE SECOND FINGER GROUP OF KEYS	
9	Observe as students practice. Assist when need is indicated.	Instruction Sheet V, LEARNING THE INDEX FINGER GROUPS OF KEYS	
10		Instruction Sheet VI, LEARNING THE THIRD FINGER GROUPS OF KEYS.	
11	Student Self-Check	Student Self-Check II, USING THE TOUCH SYSTEM ON AN ELECTRONIC CASH REGISTER	
12	Discuss and demonstrate in large or small groups each of the transaction keys on your classroom cash register. Show your students how to use each transaction key. Emphasize that stores will have different department designations.		

OPERATING THE ELECTRONIC CASH REGISTER

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
13	Observe as students practice using the transaction keys. Design practice exercises for students to use.	--Practice exercises for students to use	
14			
15	Discuss and demonstrate how to change the tape on your classroom cash register and how to prepare a cash drawer summary sheet.	SUGGESTED RESOURCE Filmstrip: Preparing a Cash Drawer Summmary Sheet, Singer	
16	Observe as students practice changing the tape.		
17	Use the Instructor's Final Checklist to Evaluate students performance.	Check-out activities need --Merchandise --Electronic cash register --Customers --Cash register tape --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.	

INTRODUCTION TO CASHIERING

FRAME 1

One of the tasks that retail salespeople perform is operating a cash register. This piece of equipment aids the retailer and salespeople in many ways, as it can be used to record numerous business transactions such as:

-record the price of individual items to calculate the total amount of sales

-provide the customer and the store with a record of sales

-record the dollar amount of paid-outs made by the retailer

-record and provide receipt of accounts receivable

-record the department number of each item sold

-tells the salesperson how much change to return to the customer.

-endorse checks received from customers

-maintain a perpetual inventory

-Order merchandise and

-Read the prices of items and record them on the register.

FRAME 2

You will be learning how to operate a cash register. It may look similiar to this electric register or

FRAME 3

it may look like this electronic one or

FRAME 4

this electronic model or

FRAME 5

it may resemble this one or

FRAME 6

this model or

FRAME 7

this electronic terminal.

FRAME 8

You will be learning to use the cash register to help you perform many functions such as; ring up large and

FRAME 9

single item sales, accept payments-on-account, make change,

FRAME 10

record paid-outs, and

FRAME 11

to endorse checks used by customers to pay for their purchases.

FRAME 12

You will also learn other skills that are related to cashiering tasks such as how to make change, how to organize the cash register change drawer, how to balance a cash register and

FRAME 13

how to accept valid consumer coupons.

FRAME 14

You will also learn to correctly perform customer services that are associated with cashiering skills such as bagging and wrapping customers purchases. Your instructor will provide you with learning materials and demonstrations in using the cash register in your classroom. You will also be given time to practice the cashiering skills in your classroom laboratory. Retailers need knowledgeable and skillful salespeople who can accurately and honestly operate cash registers. The time and effort that you spend in learning these skills will be rewarded with increases in salary and promotional opportunities.

FRAME 15

The End.

CALCULATING SALES TAX

OBJECTIVES

(1) Provided with total amounts of purchases and a sales tax chart, find the correct amount of sales tax. All answers must be correct.

(2) Provided with total amounts of purchases, find the amount of sales tax by using multiplication. All answers must be correct.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize the importance of finding the correct amount of sales tax to charge customers.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART	1
II FIGURING SALES TAX BY MULTIPLICATION	4
Student Self-Checks	
I READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART	3
II FIGURING SALES TAX BY MULTIPLICATION	5
Instructor's Final Checklist	
CALCULATING SALES TAX	6

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with various amounts of purchases and a Kentucky sales tax chart. Find the correct amount of sales tax.

(2) Your instructor will provide you with various amounts of purchases. Find the correct amount of sales tax for Kentucky by using multiplication.

Supplementals

KENTUCKY'S 5% SALES TAX COLLECTION CHART

CALCULATING SALES TAX

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART	
2	Discuss in small or large groups how to use the Kentucky Sales Tax Collection Chart. Make a transparency of the chart for the overhead projector. Give students a copy of sales tax collection chart.	--Tax charts --Overhead projector SUGGESTED RESOURCE --Filmstrip/Cassette, Calculating Sales Tax, Singer.	
3	Assist students as they practice.	Student Self-Check I, READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART. (An Answer Key is included in this section.)	
4	Demonstrate for student's how to calculate sales tax by using multiplication.	Instruction Sheet II, FIGURING SALES TAX BY MULTIPLICATION	
5	Assist students as they practice.	Student Self-Check II, FIGURING SALES TAX BY MULTIPLICATION (An Answer Key is included in this section.)	
6	Use the Instructor's Final Checklist to	--Copies of the Instructor's Final Checklist, CALCULATING SALES TAX (A Master Copy is provided in this section.)	

CALCULATING SALES TAX

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6		--Sales tax collection chart --Copies of the Check-Out Activity Sheets (A Master Copy and an Answer Key are included in this section.)	

STUDENT SELF-CHECK I

READING AND USING THE STATE OF KENTUCKY'S 5% TAX COLLECTION CHART

ANSWER KEY

(1) 30¢; (2) 80¢; (3) $1.49; (4) $1.67; (5) $1.88; (6) $2.49; (7) $2.90; (8) $3.89; (9) $4.23; (10) $5.00

STUDENT SELF-CHECK II

FIGURING SALES TAX BY MULTIPLICATION

ANSWER KEY

(1) $6.00; (2) $2.08; (3) $4.64; (4) $4.67; (5) 28¢; (6) $1.48; (7) $1.82; (8) $6.75; (9) $4.49; (10) $3.58

CHECK-OUT ACTIVITY SHEET I

DETERMINING SALES TAX

Objective #1

Directions: Find the correct amount of sales tax by using a sales tax chart.

Amount of Purchase	Amount of Tax
(1) $47.65	____________
(2) $98.70	____________
(3) $ 8.99	____________

Objective #2

Directions: Find the correct amount of sales tax by using multiplication.

Amount of Purchase	Amount of Tax
(1) $129.55	____________
(2) $109.75	____________
(3) $112.65	____________
(4) $150.00	____________

CHECK-OUT ACTIVITY SHEET

DETERMINING SALES TAX

ANSWER KEY

Objective #1

In Objective I, you are to find the correct amount of sales tax by using a sales tax chart.

Amount of Purchase	Amount of Tax
(1) $47.65	2.38
(2) $98.70	4.94
(3) $ 8.99	.45

Objective #2

In Objective II, you are to find the correct amount of sales tax by using multiplication.

Amount of Purchase	Amount of Tax
(1) $129.55	6.48
(2) $109.75	5.49
(3) $112.65	5.63
(4) $150.00	7.50

MAKING CHANGE

OBJECTIVE

Given the total purchase price of merchandise and the amount of money given by customers, make the correct change for each of the transactions. All applicable items on the Instructor's Final Checklist must be performed correctly.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that giving too much change will be costly to the store, and giving too little change will be embarrassing.

--Students will realize that they must always be honest when dealing with the customers' and store's money.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I HOW TO MAKE CHANGE	2
Student Self-Checks	
I MAKING CHANGE	4
II PRACTICE IN MAKING CHANGE	5
III CHECKLIST FOR MAKING CHANGE	6
Instructor's Final Checklist	
MAKING CHANGE	7

CHECK-OUT ACTIVITY

Your instructor will give you the total purchase price of merchandise and the amount of money given by customers. Make change for each of the transactions.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Samson, Little, Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati, 1982.

MAKING CHANGE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Ditzenberger and Kidney, Selling, Helping Customers' Buy Samson, Little, and Wingate, Retail Merchandising, Concepts and Applications,	
2		Instruction Sheet I, HOW TO MAKE CHANGE	
3	Discuss and demonstrate in small or large groups how to make change. Include in your discussion the electronic cash register that indicates the amount of change due. Include how to make change if checks are for odd amounts above the total of the purchase. Explain how to make change when customer's present extra pennies to make even denominations.	SUGGESTED RESOURCE Filmstrip/Cassette, "Making Change," Singer.	
4	Assist students with Self-Check.	Student Self-Check I, MAKING CHANGE (An answer key is provided in this section.)	
5	Assist students with Self-Check.	Student Self-Check II, PRACTICE IN MAKING CHANGE	
6	Assign each student an associate for this practice.	Student Self-Check III, CHECKLIST FOR MAKING CHANGE --Play money	

MAKING CHANGE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Use Instructor's Final Checklist to evaluate student's performance.	--Three problems concerning making change --Play money --Copies of the Instructor's Final Checklist, MAKING CHANGE (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

MAKING CHANGE

ANSWERS

1. C
2. B
3. A
4. B
5. A

Answer Key for Learning Activity #5

STUDENT SELF-CHECK II

PRACTICE IN MAKING CHANGE

ANSWERS

	AMOUNT OF THE PURCHASE	Pennies .01	Nickels .05	Dimes .10	Quarters .25	Dollars $1.00	5 Dollars $5.00	10 Dollars $10.00	20 Dollars $20.00	DENOMINATION CUSTOMER GIVES YOU
1.	4.63	2		1	1					5.00
2.	6.97	3				3		1		20.00
3.	10.62	3		1	1	4				15.00
4.	9.45		1		2			1		20.00
5.	6.19	1	1		3	3				10.00
6.	4.82	3	1	1						5.00
7.	6.96	4				3		1		20.00
8.	7.02	3		2	3	2		1		20.00
9.	9.92	3	1					1		20.00
10.	10.06	4	1	1	3	4	1	1	1	50.00
11.	1.98	2				3				5.00

ACCEPTING VALID CONSUMER COUPONS

OBJECTIVE

Given vendor and store coupons and an order of merchandise, check the coupons with the order and identify those which are valid.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that accepting invalid consumer coupons will cause their store to lose money.
--Students will realize that consumer coupons can help increase sales of merchandise.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I KINDS OF CONSUMER COUPONS	1
II ACCEPTING CONSUMER COUPONS	4

Student Self Checks	
I IDENTIFYING CONSUMER COUPONS	3
II IDENTIFYING THE PARTS OF CONSUMER COUPONS	6

Instructor's Final Checklist	
ACCEPTING VALID CONSUMER COUPONS	7

CHECK-OUT ACTIVITY

Your instructor will give you an order of merchandise and consumer coupons. Write the word "Acceptable" beside the numbers of the coupons that are valid.

ACCEPTING VALID CONSUMER COUPONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students bring consumer coupons from home and make posters that illustrate the kinds of and variety of consumer coupons. Display in classroom.	Instruction Sheet I, KINDS OF CONSUMER COUPONS Examples of consumer coupons: --Vendor --Store	
2	Discuss and show examples of store and vendor coupons.		
3	Have packages of store and vendor coupons for students to identify. Write answer keys.	Student Self-Check I, IDENTIFYING CONSUMER COUPONS	
4		Instruction Sheet II, ACCEPTING CONSUMER COUPONS	
5	Discuss in large or small groups how to accept valid consumer coupons. Reemphasize the information in Instruction Sheet I and II. Show students examples of consumer coupons.		
6	Have examples of consumer coupons for students to use. Write an answer key.	Student Self-Check II, IDENTIFYING THE PARTS OF CONSUMER COUPONS	
7	Use Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Check-Out Activity Sheets. --Copies of the Instructor's Final Checklist, ACCEPTING VALID CONSUMER COUPONS.	

ACCEPTING VALID CONSUMER COUPONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	You will have to assemble consumer coupons that will be valid for an order of merchandise.	(Master Copies are provided in this section of the manual.) --Consumer coupons; some valid; some invalid --An order of merchandise	

AUTHORIZING CUSTOMERS' CHECKS

OBJECTIVE

Given a display of six checks, and a "Checks Cashed slip", examine the checks and list on the slip all of the ones which are acceptable and describe why the others were rejected. Each acceptable check should be listed and each check that is rejected should have a correct written reason for its rejection.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

-- The students will realize that accepting bad checks can cause their store loss of money.

CONTENTS OF MODULE

Instruction Sheets — Learning Activity Number

I PARTS OF CHECKS.................................. 1

II TYPES OF CHECKS.................................. 4

III EXAMINING CHECKS FOR ACCEPTABILITY.............. 5

IV CHECK CASHING PROCEDURES........................ 6

Student Self-Checks

I PARTS OF A CHECK................................. 3

II ACCEPTABLE AND UNACCEPTABLE CHECKS.............. 8

Instructor's Final Checklist

AUTHORIZING CUSTOMERS' CHECKS........................ 9

CHECK-OUT ACTIVITY

Your instructor will provide you six checks and a "Checks Cashed Slip." List the acceptable checks on the "Checks Cashed Slip" and describe why you rejected the others.

AUTHORIZING CUSTOMERS' CHECKS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, PARTS OF CHECKS	
2	Make an overhead transparency of a check and discuss the parts of a check with your students.	Blank "specimen" checks are included in this section. --Transparency --Overhead projector	
3	Assist students with Student Self-Check I.	Student Self-Check I, PARTS OF A CHECK. --An Answer Key is included in this section.	
4	Show students examples of the different types of checks.	Instruction Sheet II, TYPES OF CHECKS --Examples of checks	
5		Instruction Sheet III, EXAMINING CHECKS FOR ACCEPTABILITY	
6	Discuss in small or large groups the information in Instruction Sheet III.	Instruction Sheet III, CHECK CASHING PROCEDURES	
7	Discuss in large or small groups "Check Cashing Procedures." Re-emphasize information in Instruction Sheet I, II, III. Ask students if they have any questions concerning a procedure. It is suggested that you make a transparency of check for using on overhead projector during discussion. Emphasize that each store will have differences in procedures.	--Transparency of check --Overhead projector SUGGESTED RESOURCE: Filmstrips and cassette, "Identifying Acceptable Checks," Singer.	

AUTHORIZING CUSTOMERS' CHECKS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
8	Assist students with Self-Check.	Student Self-Check II, ACCEPTABLE AND UNACCEPTABLE CHECKS --An Answer key is included in this section.	
9	Use Instructor's Checklist to evaluate student's performance. Complete the "specimen" checks for the Check-Out Activity. Design an answer key.	--Copies of the Check-Out Activity Sheet and the Instructor's Final Checklist, AUTHORIZE CUSTOMERS' CHECKS. (A Master Copy is provided in this section of the manual.) --Blank "specimen" checks are included in this section. --Checks Cashed Slip is included in this section.	

STUDENT SELF-CHECK I

PARTS OF A CHECK

ANSWER KEY

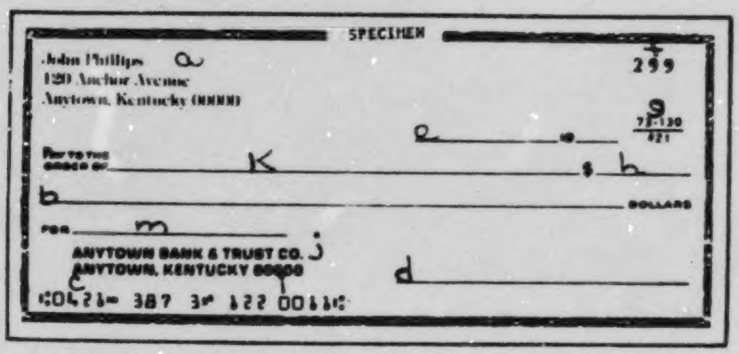
1. f -- Check number
2. g -- Bank identification number
3. e -- Date
4. h -- Numerical amount of check
5. d -- Payer's signature
6. i -- Payer's account number
7. c -- MICR encoding number
8. j -- Payer's bank name and address
9. b -- Written out amount of check
10. k -- Payee
11. a -- Payer's name and address
12. l -- Endorsement
13. m -- Purpose of the check

STUDENT SELF-CHECK I, (page 2)

PARTS OF A CHECK

ANSWER KEY

Your check parts should be labeled as the following check:



SPECIMEN

John Phillips
120 Anchor Avenue
Anytown, Kentucky 00000

299

19

73-130
421

PAY TO THE ORDER OF $

DOLLARS

FOR

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

⑆0421⑈ 387 3⑈ 122 0011⑆

STUDENT SELF-CHECK II

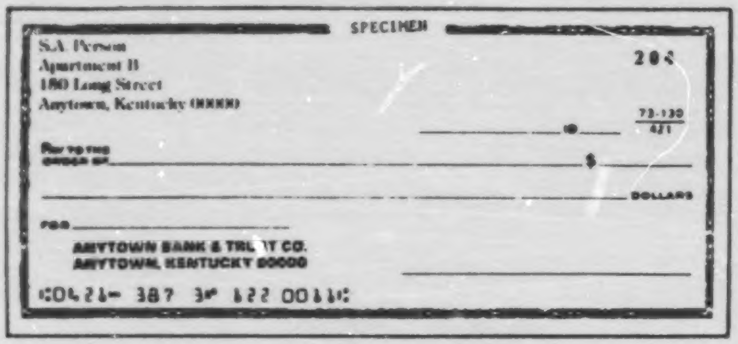
ACCEPTABLE AND UNACCEPTABLE CHECKS

ANSWER KEY

1. This check is acceptable.
2. This check is unacceptable because the date is incomplete and the payer signature is different than the printed name.
3. This check is unacceptable because it is dated incorrectly and the numerical and written amount do not agree.

CHECK-OUT ACTIVITY SHEET

Directions: View the following checks to see if they would be acceptable or unacceptable. List the acceptable checks on the Checks Cashed Slip.



SPECIMEN

S.A. Person
Apartment B
180 Long Street
Anytown, Kentucky 00000

204

19

73-130
421

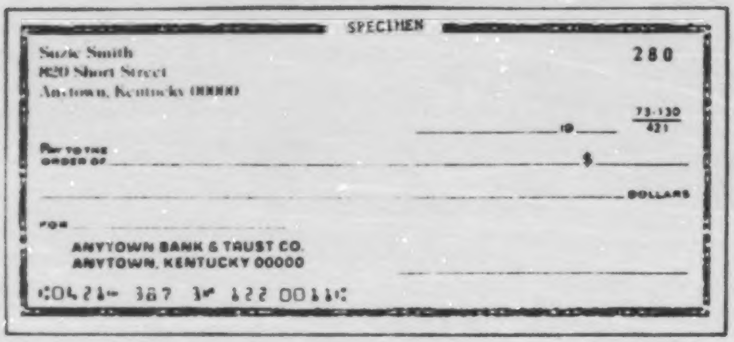
PAY TO THE ORDER OF $

DOLLARS

FOR

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

:0421- 387 3" 122 0011:



SPECIMEN

Suzie Smith
820 Short Street
Anytown, Kentucky 00000

280

19

73-130
421

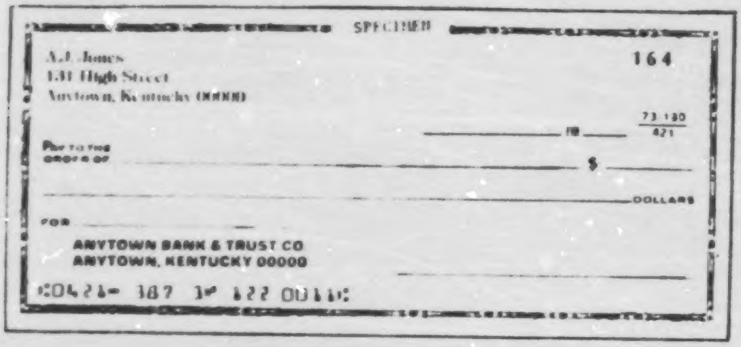
PAY TO THE ORDER OF $

DOLLARS

FOR

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

:0421- 387 3" 122 0011:



SPECIMEN

A.J. Jones
131 High Street
Anytown, Kentucky 00000

164

19

73-130
421

PAY TO THE ORDER OF $

DOLLARS

FOR

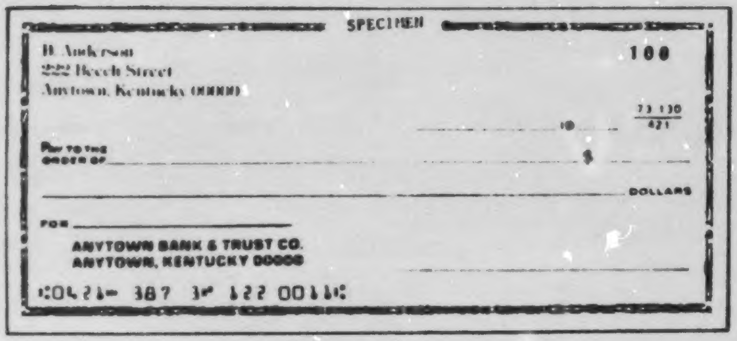
ANYTOWN BANK & TRUST CO
ANYTOWN, KENTUCKY 00000

:0421- 387 3" 122 0011:

BEST COPY AVAILABLE

BEST COPY AVAILABLE

CHECK-OUT ACTIVITY SHEET, (page 2)



SPECIMEN

B. Anderson
222 Beech Street
Anytown, Kentucky 00000

100

______ 19 ____ 73-130/421

PAY TO THE ORDER OF ______ $ ______

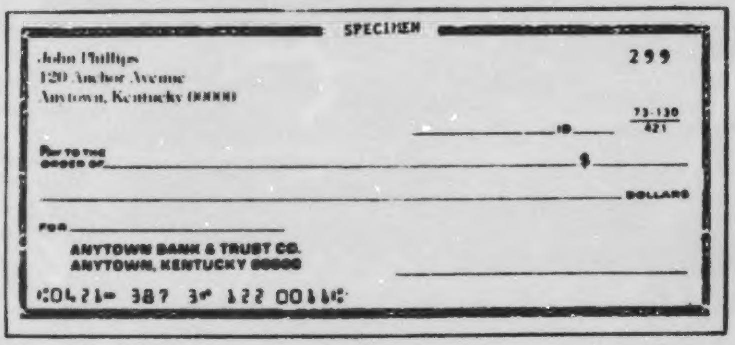
______ DOLLARS

FOR ______

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

______

⑆0421⑉ 387 3⑈ 122 0011⑆



SPECIMEN

John Phillips
120 Anchor Avenue
Anytown, Kentucky 00000

299

______ 19 ____ 73-130/421

PAY TO THE ORDER OF ______ $ ______

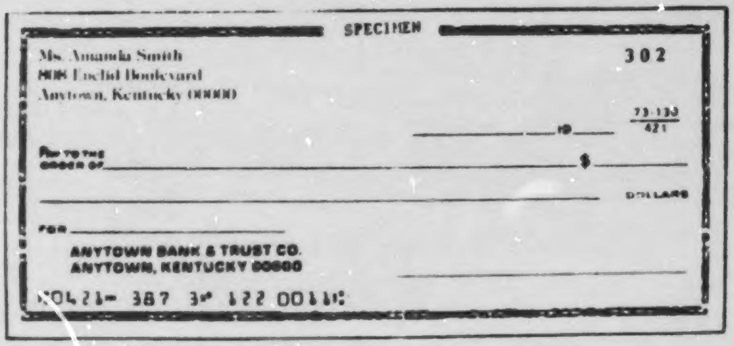
______ DOLLARS

FOR ______

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

______

⑆0421⑉ 387 3⑈ 122 0011⑆



SPECIMEN

Ms. Amanda Smith
808 Euclid Boulevard
Anytown, Kentucky 00000

302

______ 19 ____ 73-130/421

PAY TO THE ORDER OF ______ $ ______

______ DOLLARS

FOR ______

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

______

⑆0421⑉ 387 3⑈ 122 0011⑆

Master Copy for Learning Activity #9

CHECK-OUT ACTIVITY SHEET, (page 3)

CHECKS CASHED

REGISTER NO.__________ DATE________________ NAME____________________

CHECK NO.	MAKER	P	B	G	AMOUNT	

Signature of Cashier-Checker____________________

P- Personal Checks
B- Business Firms
G- Government

WRITING SALES TRANSACTIONS

OBJECTIVE

Provided four customers and sales tickets, write sales transactions for a cash purchase, a charge purchase, a lay-away purchase, and a received-on-account transaction. The tickets must be completed in full with no errors in mathematical computations.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that their personal image is reflected in the way they perform sales related services for customers.
--The students will realize that they can use this time to introduce customers to new merchandise.
--The students will realize that by being accurate when recording sales transactions future problems can be avoided.
--The students will realize that all business forms must be accurately and completely filled out if a clear communication line is to be maintained.
--The students will realize that retail sales transactions are not complete until they have been documented.
--The students will realize that business forms should be filled out completely, legibly, and accurately.
--The students will realize that many people will use the sales tickets in the operation of the store's business.
--The students will realize the importance of all business transactions.

CONTENTS OF MODULE

	Instruction Sheets	Learning Activity Number
I	THE SALES TICKET..................................	2
II	USING THE SALES TICKET FOR RECORDING CASH SALES..	5
III	USING THE SALES TICKET TO RECORD CHARGE SALES TRANSACTIONS............................	9
IV	WRITING A CHARGE PLATE SALES TICKET............	12
V	RECORDING LAY-AWAY SALES ON SALES TICKET........	15
VI	USING THE SALES TICKET TO RECORD CUSTOMERS' PAYMENTS-ON-ACCOUNT............................	18

	Student Self-Checks	
I	WRITING CASH SALES TICKETS.......................	7
II	WRITING A CHARGE SALES TICKET....................	11
III	PROCESSING LAY-AWAY SALES........................	17

WRITING SALES TRANSACTIONS

Instructor's Final Checklist

WRITING SALES TRANSACTIONS.......................... 20

CHECK-OUT ACTIVITY

Your instructor will provide you four customers and sales tickets. Write sales transactions for a cash purchase, a lay-away purchase, a charge purchase, and a received-on-account transaction.

SUGGESTED REFERENCES

Ditzenberger, Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1982.

Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, Gregg/McGraw-Hill, St. Louis.

WRITING SALES TRANSACTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Ditzenberger and Kidney, Selling, Helping Customers Buy, "Sales Forms and Transactions." Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Recording Sales."	
2		Instruction Sheet I, THE SALES TICKET	
3	Discuss and show, in large or small groups, a transparency of the sales ticket. Emphasize: --How it is used to document many business transactions. --The importance of accuracy and legibility. --Information that is written to document a "charge sale."	Instruction Sheet I, THE SALES TICKET (A Master Copy of the sales ticket form is included in in this section.) --Transparency film --Sales ticket --Overhead projector	
4		See LA #1.	
5		Instruction Sheet II, USING THE SALES TICKET FOR RECORDING CASH SALES	
6	Discuss and demonstrate, in large or small groups, how to write cash sales tickets. Emphasize: --Accuracy. --Complete information. --Delivery instructions. --Legibility.	--Transparency film --Copies of cash sales ticket (A Master Copy is included in this section.)	

WRITING SALES TRANSACTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Make a transparency master of Cash Sales Ticket for using on overhead projector. Demonstrate how to write a cash sales ticket.		
7	Students will need copies of sales tickets.	Student Self-Check I, WRITING CASH SALES TICKETS (A Master Copy of the sales ticket form is included in this section.) --An Answer Key is provided in this section of the manual.	
8		See LA #1.	
9		Instruction Sheet III, USING THE SALES TICKET TO RECORD CHARGE SALES TRANSACTIONS	
10	Discuss and demonstrate, in small or large groups, how to write customer's charge sales transactions. Emphasize: --Accuracy. --Clarity of writing. --Following store procedures. --Mathematical accuracy. Make transparency masters of charge sales tickets and demonstrate for students how to complete.	SUGGESTED RESOURCE Filmstrip/Cassette, "Writing Up Charge Purchases," by Singer. --Overhead projector --Transparency film	
11	Design additional practice problems for students to use.	Student Self-Check II, WRITING A CHARGE SALES TICKET	

WRITING SALES TRANSACTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
		--An Answer Key is provided in this section of the manual.)	
12	Additional information is in LA #1 references.	Instruction Sheet IV, WRITING A CHARGE PLATE SALES TICKET	
13	Discuss and demonstrate, in large or small groups, how to write charge plate sales transactions. Emphasize: --Asking for authorization. --Checking validation of card.		
14		See LA #1.	
15		Instruction Sheet V, RECORDING LAY-AWAY SALES ON SALES TICKETS	
16	Discuss and demonstrate, in large or small groups, how to process customers' payments-on-account. Emphasize accuracy and clarity of writing. Make transparency of payment-on-account form. Use overhead projector during demonstration.	--Transparency film --Overhead projector --Customer's payment-on-account form. (A Master Copy is included in this section.) SUGGESTED RESOURCE Filmstrip/Cassette, "Handling Accounts Receivable," by Singer.	
17		Student Self-Check III, PROCESSING LAY-AWAY SALES. --An Answer Key is provided in this section of the manual.	

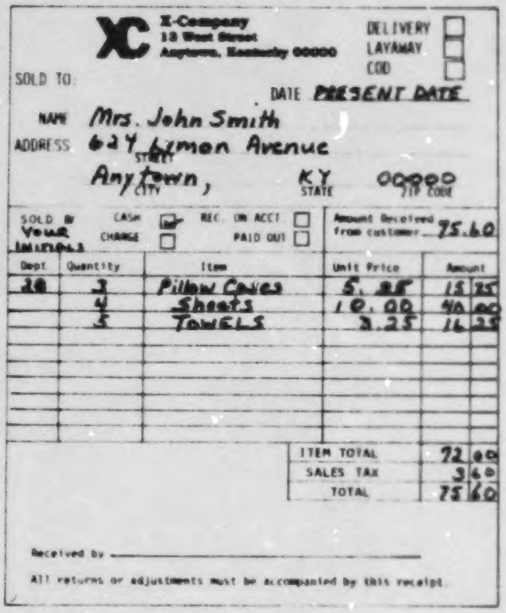
WRITING SALES TRANSACTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
18-19	Provide each student a practice sheet and have them practice this task in the learning lab.	--Copies of the Student Practice Sheet. (A Master Copy is included in this section of the manual.)	
20	For this Check-Out Activity you will need to plan to have four people to role play customers: one to role play a charge customer; one to role play a cash customer; one to role play a "Lay-Away" charge customer; and one to role play a customer who wishes to pay-on-account. Design case problems for each customer to use. Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist, WRITING SALES TRANSACTIONS. (A Master Copy in included in this section of the manual.) --Sales tickets --Customers (4) --Copies of the sales ticket form. (A Master Copy is included in this section.)	

STUDENT SELF-CHECK I

WRITING CASH SALES TICKETS

ANSWER KEY



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:
DATE PRESENT DATE
NAME Mrs. John Smith
ADDRESS 624 Lymon Avenue
STREET
Anytown, KY 00000
CITY STATE ZIP CODE

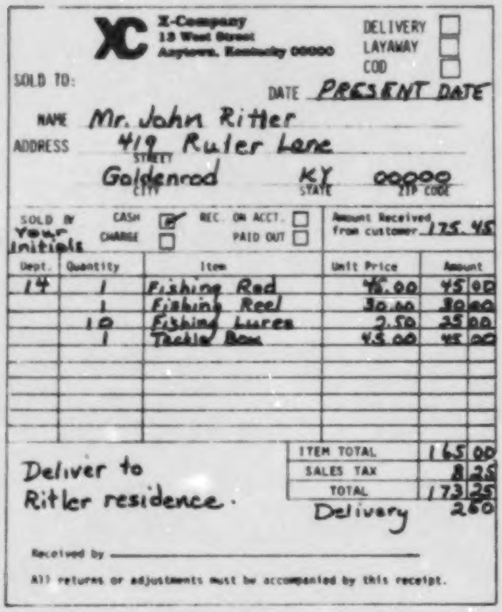
SOLD BY Your Initials
CASH ☑ CHARGE ☐
REC. ON ACCT. ☐ PAID OUT ☐
Amount Received from customer 75.60

Dept	Quantity	Item	Unit Price	Amount	
20	3	Pillow Cases	5.25	15	25
	4	Sheets	10.00	40	00
	5	TOWELS	3.25	16	25

ITEM TOTAL	72	00
SALES TAX	3	60
TOTAL	75	60

Received by ____________

All returns or adjustments must be accompanied by this receipt.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:
DATE PRESENT DATE
NAME Mr. John Ritter
ADDRESS 419 Ruler Lane
STREET
Goldenrod KY 00000
CITY STATE ZIP CODE

SOLD BY Your initials
CASH ☑ CHARGE ☐
REC. ON ACCT. ☐ PAID OUT ☐
Amount Received from customer 175.45

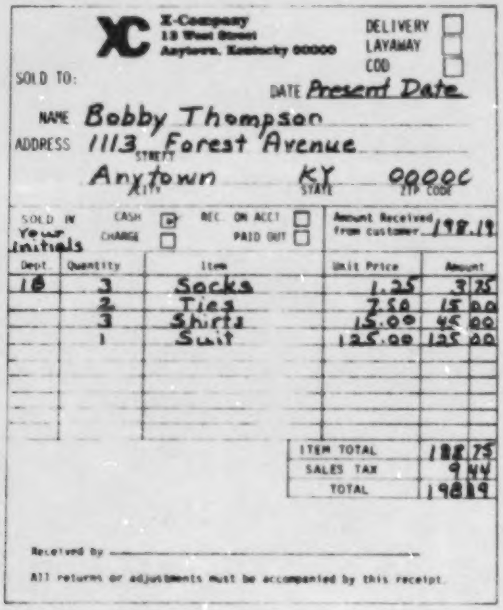
Dept.	Quantity	Item	Unit Price	Amount	
14	1	Fishing Rod	45.00	45	00
	1	Fishing Reel	30.00	30	00
	10	Fishing Lures	2.50	25	00
	1	Tackle Box	45.00	45	00

ITEM TOTAL	165	00
SALES TAX	8	25
TOTAL	173	25
Delivery	2	50

Deliver to Ritler residence.

Received by ____________

All returns or adjustments must be accompanied by this receipt.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:
DATE Present Date
NAME Bobby Thompson
ADDRESS 1113 Forest Avenue
STREET
Anytown KY 00000
CITY STATE ZIP CODE

SOLD BY Your Initials
CASH ☑ CHARGE ☐
REC. ON ACCT. ☐ PAID OUT ☐
Amount Received from customer 198.19

Dept.	Quantity	Item	Unit Price	Amount	
10	3	Socks	1.25	3	75
	2	Ties	7.50	15	00
	3	Shirts	15.00	45	00
	1	Suit	125.00	125	00

ITEM TOTAL	188	75
SALES TAX	9	44
TOTAL	198	19

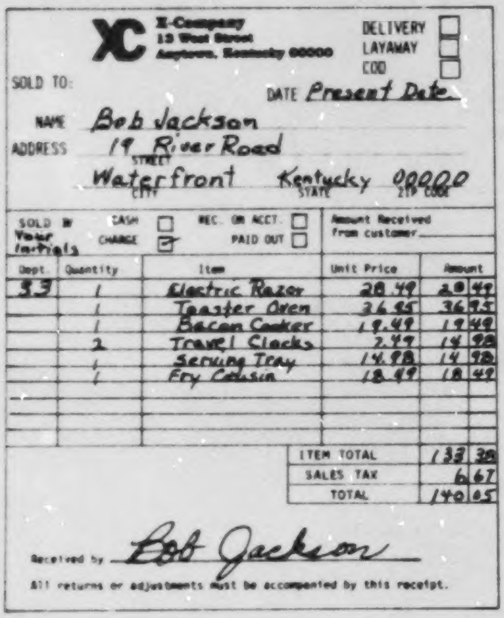
Received by ____________

All returns or adjustments must be accompanied by this receipt.

STUDENT SELF-CHECK II

WRITING A CHARGE SALES TICKET

ANSWER KEY



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE Present Date

NAME Bob Jackson
ADDRESS 19 River Road
STREET
Waterfront Kentucky 00000
CITY STATE ZIP CODE

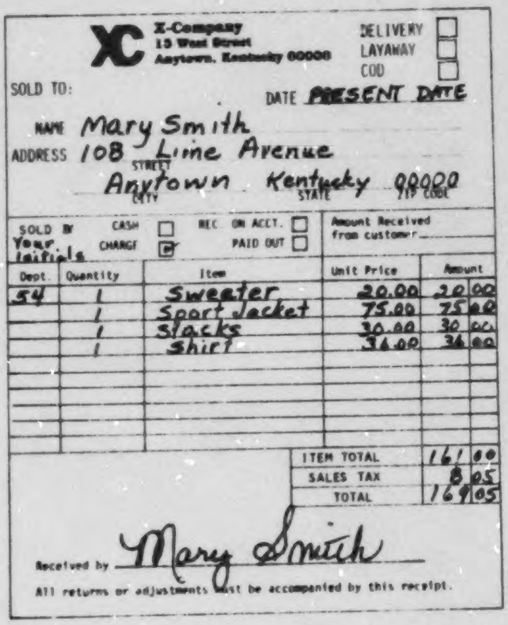
SOLD BY Your initials
CASH ☐
CHARGE ☑
REC. ON ACCT. ☐
PAID OUT ☐
Amount Received from customer

Dept.	Quantity	Item	Unit Price	Amount	
33	1	Electric Razor	28.49	28	49
	1	Toaster Oven	36.95	36	95
	1	Bacon Cooker	19.49	19	49
	2	Travel Clocks	7.49	14	98
	1	Serving Tray	14.98	14	98
	1	Fry Casusin	18.49	18	49

ITEM TOTAL	133	38
SALES TAX	6	67
TOTAL	140	05

Received by Bob Jackson

All returns or adjustments must be accompanied by this receipt.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE PRESENT DATE

NAME Mary Smith
ADDRESS 108 Line Avenue
STREET
Anytown Kentucky 00000
CITY STATE ZIP CODE

SOLD BY Your initials
CASH ☐
CHARGE ☑
REC. ON ACCT. ☐
PAID OUT ☐
Amount Received from customer

Dept.	Quantity	Item	Unit Price	Amount	
54	1	Sweater	20.00	20	00
	1	Sport Jacket	75.00	75	00
	1	Slacks	30.00	30	00
	1	Shirt	36.00	36	00

ITEM TOTAL	161	00
SALES TAX	8	05
TOTAL	169	05

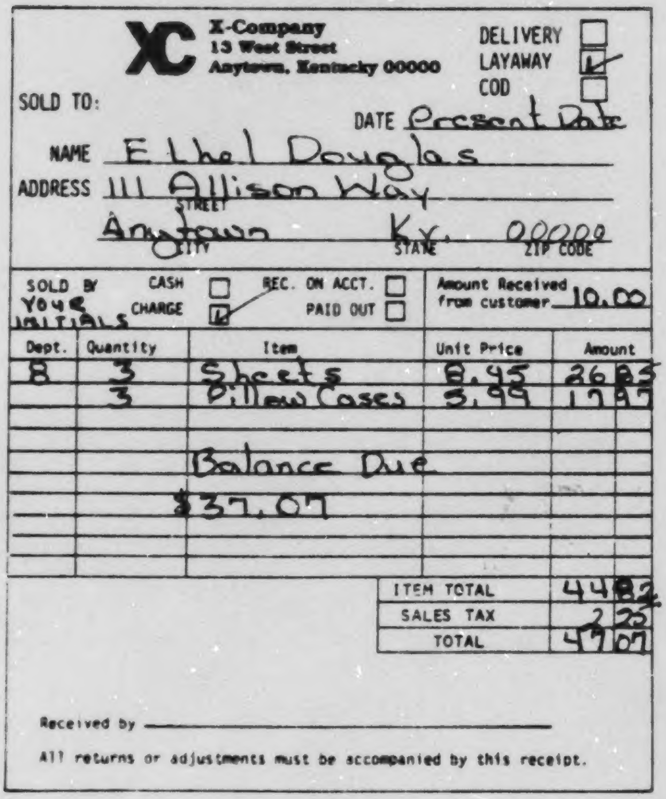
Received by Mary Smith

All returns or adjustments must be accompanied by this receipt.

STUDENT SELF-CHECK III

PROCESSING LAY-AWAY SALES

ANSWER KEY



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☑
COD ☐

SOLD TO:

DATE Present Date

NAME Ethel Douglas

ADDRESS 111 Allison Way (STREET)

Anytown (CITY) Ky. (STATE) 00000 (ZIP CODE)

SOLD BY Your Initials

CASH ☐ CHARGE ☑ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer 10.00

Dept.	Quantity	Item	Unit Price	Amount	
8	3	Sheets	8.45	26	85
	3	Pillow Cases	5.99	17	97
		Balance Due			
		$37.07			

ITEM TOTAL	44	82
SALES TAX	2	25
TOTAL	47	07

Received by ______________________

All returns or adjustments must be accompanied by this receipt.

STUDENT PRACTICE SHEET

WRITING RECEIPTS FOR CUSTOMERS' PAYMENTS-ON-ACCOUNT

Directions: Practice writing receipts for the following case problems that involve customers' payments-on-account. Ask your instructor for form. Check your practice exercises according to procedures established by your instructor.

Case Problem I

Allison Ryker, 111 First Street, Anytown, Kentucky 00000, wishes to make a $50 payment by check on her account. Process Allison's payment.

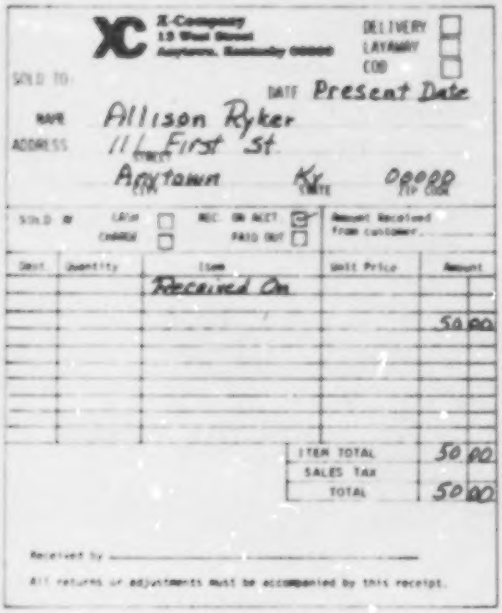
Case Problem II

Tom G. Alexander, 333 Third Avenue, Anytown, Kentucky 00000, asks you to accept a payment of $145.50 on this charge account. Process this payment.

STUDENT PRACTICE SHEET

WRITING RECEIPTS FOR CUSTOMERS' PAYMENTS-ON-ACCOUNT

ANSWER KEY



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE Present Date

NAME Allison Ryker
ADDRESS 11 L First St
STREET
Anytown Ky 00000
CITY STATE ZIP CODE

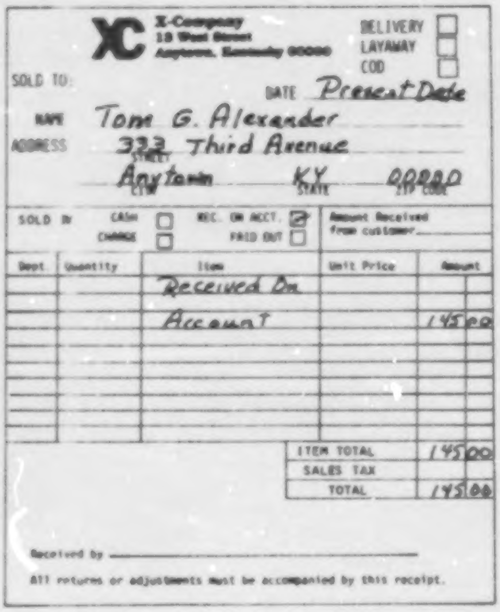
SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT ☑ PAID OUT ☐ Amount Received from customer

Dept.	Quantity	Item	Unit Price	Amount
		Received On		
				50 00

ITEM TOTAL 50 00
SALES TAX
TOTAL 50 00

Received by

All returns or adjustments must be accompanied by this receipt.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE Present Date

NAME Tom G. Alexander
ADDRESS 333 Third Avenue
STREET
Anytown KY 00000
CITY STATE ZIP CODE

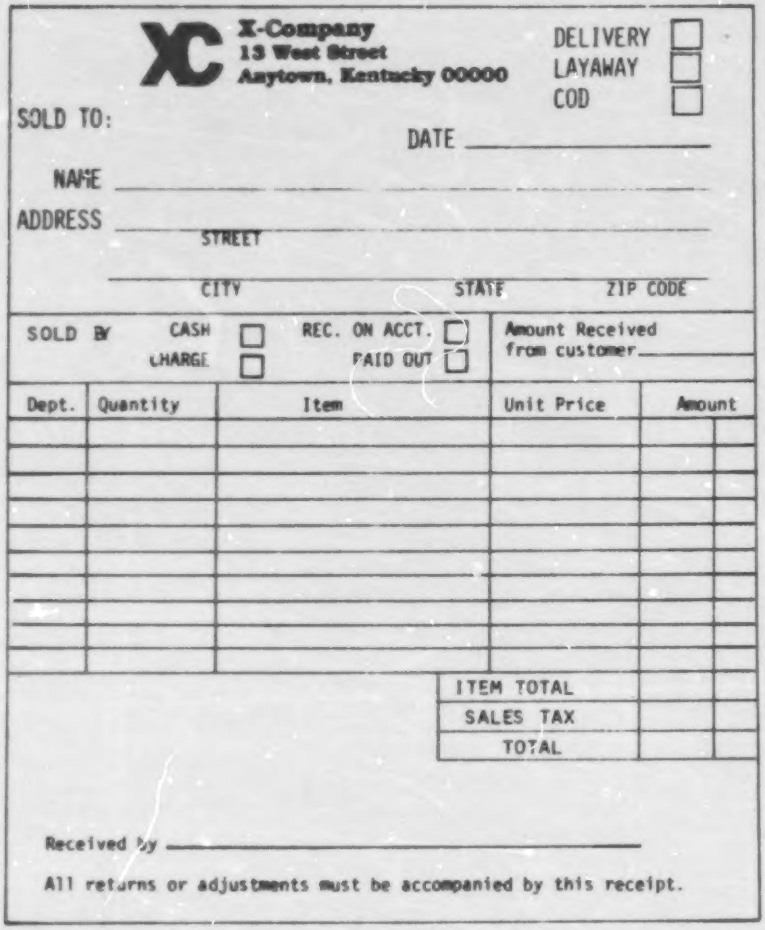
SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☑ PAID OUT ☐ Amount Received from customer

Dept.	Quantity	Item	Unit Price	Amount
		Received On		
		Account		145 00

ITEM TOTAL 145 00
SALES TAX
TOTAL 145 00

Received by

All returns or adjustments must be accompanied by this receipt.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE ______________

NAME ______________________________

ADDRESS ______________________________
STREET

____
CITY STATE ZIP CODE

SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer________

Dept.	Quantity	Item	Unit Price	Amount	
			ITEM TOTAL		
			SALES TAX		
			TOTAL		

Received by ______________________________

All returns or adjustments must be accompanied by this receipt.

PROCESSING BANK CARD SALES TRANSACTIONS

OBJECTIVE

Provided a customer who desires to make a bank card sales transaction, merchandise, a bank card, a bank card sales draft, and an imprinter, process the sales transaction. All applicable information must be recorded on the bank card sales draft; the draft must be signed by the customer; and each mathematical computation must be correct.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The stduents will realize the importance of writing clearly and the importance of including accurate and complete information on all business forms.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I THE BANK CARD SALES TRANSACTION	1
II WRITING A BANK CARD SALES DRAFT	2
Student Self-Check	
I WRITING A BANK CARD SALES DRAFT	5
Instructor's Final Checklist	
PROCESSING BANK CARD SALES TRANSACTIONS	6

CHECK-OUT ACTIVITY

Your instructor will provide you with a customer (classmate) who desire to make a purchase by using a bank card. Process the bank card sales transaction.

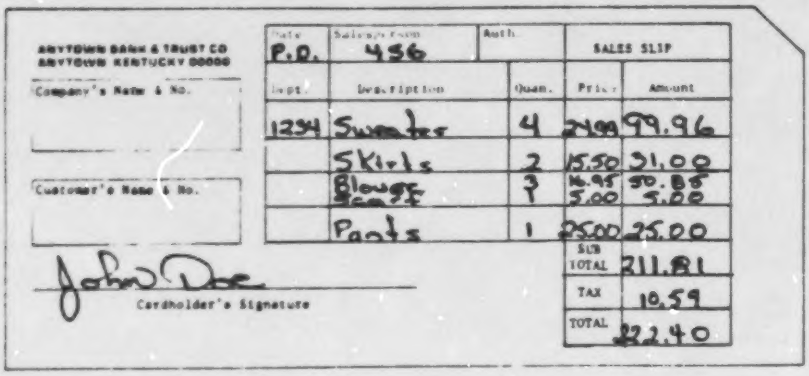
PROCESSING BANK CARD SALES TRANSACTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Arrange for a local banker to discuss, with students, the bank card and how it is used in retailing.	Instruction Sheet I, THE BANK CARD SALES TRANSACTION	
2	Make a transparency master of the sample bank card sales ticket in this module and demonstrate, to students, how to complete it.	Instruction Sheet II, WRITING A BANK CARD SALES DRAFT	
3	Discuss and demonstrate how to process bank card sales drafts.	SUGGESTED REFERENCE Chase Manhattan Bank, The Cashier, Gregg, pp. 53-61, 69-77.	
4	Show filmstrips in small or large groups.	SUGGESTED RESOURCE "Credit Cards: How, What Why," Flimstrip/Cassette by Singer.	
5	Student Self-Check: Help students during the self-check activity.	Student Self-Check I, WRITING A BANK CARD SALES DRAFT --An Answer Key is provided in this section of the manual.	
6	Use the Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist, PROCESSING BANK CARD SALES TRANSACTIONS. (A Master Copy is provided in this section of the manual.)	

STUDENT SELF-CHECK I

WRITING A BANK CARD SALES DRAFT

ANSWER KEY



ANYTOWN BANK & TRUST CO
ANYTOWN KENTUCKY 00000

Company's Name & No.

Customer's Name & No.

John Doe
Cardholder's Signature

Date	Salesperson	Auth.	SALES SLIP
P.D.	456		

Dept.	Description	Quan.	Price	Amount
1234	Sweater	4	24.99	99.96
	Skirts	2	15.50	31.00
	Blouse Scarf	3 1	16.95 5.00	50.85 5.00
	Pants	1	25.00	25.00
			SUB TOTAL	211.81
			TAX	10.59
			TOTAL	222.40

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CHECK-OUT ACTIVITY SHEET

PROCESSING BANK CARD SALES TRANSACTIONS

Directions: Process the following bank card sales transaction. An imprinting machine, credit card, sales draft, and warning notice will be provided.

Items Purchased:

One shirt @ $15.00
Three jerseys @ $8.50
Two pair tube socks @ $2.50
One sweat suit @ $39.50
One pair tennis shoes @ $41.99

****

The department number is 22; the clerk number is 89; use your initials. Use current date, 5% sales tax, and $50 floor limit. Authorization code, if needed, is 23-ser. The customer will take the merchandise with him/her.

PROCESSING RETURNS AND ADJUSTMENTS

OBJECTIVES

(1) Provided a customer who desires to return merchandise, customer sales receipt, and a return form, process the return. When finished, all applicable information must be written on the form, and all applicable monies must be returned to the customer.

(2) Provided a customer who desires a merchandise adjustment, process the adjustment. All applicable items on the Instructor's Final Checklist should be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that quick and pleasant settling of customer requests for cash refunds will preserve customer good will.
--The students will realize that all cash transactions must be documented.
--The students will realize that the exchange process can, when done properly, be used to build customer good will and confidence in the store.
--The students will realize that if business forms are to accurately communicate information they must be accurately completed.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I PROCESSING CUSTOMERS' RETURNS..................	2
II PROCESSING CASH RETURNS.........................	3
III HANDLING CUSTOMERS' MERCHANDISE ADJUSTMENTS.....	7
IV COMPLETING A MERCHANDISE ADJUSTMENT FORM........	10

Student Self-Checks	
I PROCESSING CUSTOMERS' RETURNS..................	5
II HANDLING MERCHANDISE ADJUSTMENTS...............	9

Instructor's Final Checklist	
PROCESSING RETURNS AND ADJUSTMENTS.................	11

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you a customer request for a cash refund and a refund form. Fill out the form and make the refund.

(2) Your instructor will provide you a customer who desires a merchandise adjustment. Make the adjustment.

PROCESSING RETURNS AND ADJUSTMENTS

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Richert, Meyer, Haines, Harris, Retailing Principles and Practices, Gregg/McGraw-Hill, St. Louis.

Samson, Little, Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati, 1982.

PROCESSING RETURNS AND ADJUSTMENTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Richert, Meyer, Haines, and Harris, Retailing, Principles and Practices, "Handling Returns and Adjustments." Ditzenberger and Kidney, Selling, Helping Customers Buy, "Returns." Samson, Little and Wingate, Retail Merchandising Concepts and Applications, "Returns and Adjustments."	
2		Instruction Sheet I, PROCESSING CUSTOMERS' RETURNS	
3		Instruction Sheet II, PROCESSING CASH RETURNS	
4	Discuss in large or small groups the information in Instruction Sheet II. Emphasize: --Knowing and following store policy concerning cash refunds. --Documenting transaction. --Accuracy. --Writing clearly. --Different store policies. Make a transparency of the form to show students on overhead projector. A copy of the form is included in this section.	SUGGESTED RESOURCE Filmstrip/Cassette, "Returning Goods for Credit," by Singer.	

PROCESSING RETURNS AND ADJUSTMENTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Help students who have difficulty with this Self-Check.	Student Self-Check I, PROCESSING CUSTOMERS' RETURNS --An Answer Key is provided in this section of the manual.	
6		See LA #1.	
7		Instruction Sheet III, HANDLING CUSTOMERS' MERCHANDISE ADJUSTMENTS	
8	Discuss in large group how to handle and process customers' adjustments. Emphasize: --Even and uneven exchanges. --Maintaining customer goodwill. --How store policies may be different. Make a transparency of form to use to show students how to complete one.	--Transparency film --Overhead projector --Adjustment form (A Master Copy included in this section.)	
9		Student Self-Check II, HANDLING MERCHANDISE ADJUSTMENTS --An Answer Key is provided in this section of the manual.	
10		Instruction Sheet IV, COMPLETING A MERCHANDISE ADJUSTMENT FORM	

PROCESSING RETURNS AND ADJUSTMENTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
11	Use the Instructor's Final Checklist to evaluate each student's performance. People will be needed to role play customers.	--Copies of the Check-Out Activity Sheet. --Copies of the Instructor's Final Checklist, PROCESSING RETURNS AND ADJUSTMENTS. --An Answer Key is provided in this section of the manual. --An Adjustment Form is included in this section.	

STUDENT SELF-CHECK I

PROCESSING CUSTOMERS' REFUNDS

ANSWER KEY

Merchandise Cash Refund		
Date / /83	Sold by Your Initials	
Mdse. Returned Acme pop corn popper	27	88
Mdse. Purchased None	—	
Amt. of Refund	27	88
Amt. of Tax	1	39
Refund Total	29	27

Reason: Switch of the pop corn popper is defective

Name Ms Alice Duvall

Address 1433 Ninth Street

City Anytown State Ky Zip 00000

Customer Sign. Ms Alice Duvall

Mgr. Mr Tom Allison

BEST COPY AVAILABLE

STUDENT SELF-CHECK II

HANDLING MERCHANDISE ADJUSTMENTS

ANSWER KEY

1. True
2. False
3. True
4. False
5. True
6. True
7. True
8. True
9. True
10. True

CHECK-OUT ACTIVITY SHEET

PROCESSING RETURNS

Directions: As a salesperson at X Department Store you have been asked by a customer, Ms. Julie Johnson, 111 First Street, Anytown, Kentucky 00000, to refund the money, $35.99, that she paid for an Acme electric ice cream freezer. The freezer has a defective switch. She does not want a cash credit or a merchandise exchange. Your department manager, Ms. Rita VanHoose, approves the cash refund. Complete the following cash refund form to document the transaction.

Merchandise Cash Refund

Date	Sold by		
Mdse. Returned Mdse. Purchased			
	Amt. of Refund		
	Amt. of Tax		
	Refund Total		

Reason: ______________________

Name ______________________

Address ______________________

City __________ State __________ Zip ______

Customer Sign. ______________________

Mgr. ______________________

CHECK-OUT ACTIVITY SHEET

PROCESSING RETURNS

ANSWER KEY

Merchandise Cash Refund		
Date Present Date	Sold by	
Mdse. Returned Acme electric ice cream freezer	35	99
Mdse. Purchased None		
Amt. of Refund	35	99
Amt. of Tax	2	00
Refund Total	37	99
Reason: Defective switch		
Name Mrs. Julie Johnson		
Address 111 First Street		
City Anytown State Ky. Zip 00000		
Customer Sign. Julie Johnson		
Mgr. Rita Van Hoose		

BEST COPY AVAILABLE

Merchandise Cash Refund

Date	Sold by		
Mdse. Returned Mdse. Purchased			
Amt. of Refund			
Amt. of Tax			
Refund Total			

Reason: ____________________

Name ____________________

Address ____________________

City ____________ State ____________ Zip ______

Customer Sign. ____________________

Mgr. ____________________

GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES

OBJECTIVE

(1) Given merchandise and access to gift wrapping tools and materials, gift wrap the merchandise. The finished packages must compare with the instructor's model.

(2) Provided merchandise, bags, boxes, scissors, wrapping paper, packing material, tape, and a wrapping area, package the merchandise. The packaging/bagging must be secure and appropriate for the type of merchandise, and it must have the customer's copy of the sales ticket attached.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that customer services performed well bring customers back to a store.

--Students will realize that performing tasks without wasting materials will be beneficial to the employees and to the store.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I GIFT WRAPPING: A CUSTOMER SERVICE.............	1
II GIFT WRAPPING BOXES, CYLINDERS, AND LARGE/ODD-SHAPED MERCHANDISE............................	2
III PACKAGING/BAGGING CUSTOMERS' PURCHASES.........	7
Student Self-Check	
I PACKAGING/BAGGING CUSTOMERS' PURCHASES.........	9
Instructor's Final Checklist	
GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES.....	10

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you gift wrapping tools, materials, and items to be gift wrapped. Wrap each item.

(2) Your instructor will provide you with a variety of items to package/bag. Package/bag each of the items of merchandise.

GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	This is also a good time to discuss how the ability to gift wrap can help students acquire employment in retailing.	Instruction Sheet I, GIFT WRAPPING: A CUSTOMER SERVICE	
2		Instruction Sheet II, GIFT WRAPPING BOXES CYLINDERS AND LARGE/ODD-SHAPED MERCHANDISE	
3	Discuss, in large or small groups, the importance of gift wrapping. Demonstrate, in large or small groups, how to wrap boxes and cylinders. Newspaper can be used for student practice. Demonstrate in large or small groups how to tie a ribbon to packages. Demonstrate, in large or small groups, how to tie bows. Use hand and/or machine tying.	SUGGESTED RESOURCE R-36 Slide-Tape Presentation, "Gift Wrapping." --Newspaper print --Ribbon --Packages --Bow tying machine --Ribbon for bow tying	
4	Prepare materials for student practice.	--Boxes --Cylinders --Gift wrap --Newspaper --Cellophane tape --Scissors --Work tables	
5	Discuss in large or small groups the information in this Instruction Sheet.	Instruction Sheet III, PACKAGING/BAGGING CUSTOMERS' PURCHASES SUGGESTED RESOURCE Filmstrip: "Bagging Merchandise, "Singer --Filmstrip projector with cassette player	

GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Demonstrate, in large group, how to package/bag merchandise. Use a wide variety of sizes and shapes of merchandise.	--Merchandise --Packing material --Wrapping material --Scissors --Twine --Wrapping table --Paper bags and sacks --Assorted size boxes	
7	Observe as students practice. Assist those that have difficulty.	--Merchandise --Wrapping table --Wrapping material --Scissors --Twine --Packing material --Bags and sacks --Boxes of assorted sizes	
	Students can use this Checklist to evaluate their work.	Student Self-Check I, PACKAGING/BAGGING CUSTOMERS PURCHASES	
8	Use the Instructor's Final Checklist to evaluate each student's performance.	--Bags and packing materials --Gift wrapping tools and materials --Copies of the Instructor's Final Checklist, GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES. (A Master Copy is provided in this section of the manual.)	

GIFT WRAPPING

FRAME 1

Gift wrapping is a customer service that is offered by many retailers. When it is done attractively by salespeople or by people who work in gift wrapping departments it is a customer service that helps to bring customers back to the store again and again. This slide-tape presentation will show you how to wrap gifts attractively.

FRAME 2

Many large department stores have gift wrapping departments at which customers can have their purchases gift wrapped by well trained employees. The packages can be wrapped appropriately for many gift giving occasions such as: birthdays, weddings, Christmas, Mothers' and Fathers' Days. Observe that this gift-wrapping department displays examples of the various types of packages that are offered.

FRAME 3

Before you wrap gifts, remove the price tags. Leave hangtags or special instructions on the merchandise. The items are boxed to provide for a protective enclosure and to make wrapping an easier activity. When accepting a gift for wrapping, ask your customers if they wish to enclose a card with their gift. Some stores provide customers with free gift-wrap based upon the cost of the merchandise. If this is the case, you must read the customers receipt to determine the kind of wrap to use. Gift-wrapping is made easier if the items are boxed. You will receive instructions about how to wrap non-boxed merchandise later.

FRAME 4

Using a yard stick, measure both the length and depth of the box, add these measurements together and double the total.

FRAME 5

Measure this amount on the roll

FRAME 6

Cut or tear this amount of wrapping paper from the roll. You should avoid wasting wrapping paper since it is expensive.

FRAME 7

Place the boxed item in the center of the paper and pull one end of the paper up and over the box. Tape down the flap with cellophane tape.

FRAME 8

Pull the other end of the wrapping paper up and over the box and tape this end down.

FRAME 9

Close the ends of the wrap by folding in the sides of the paper as shown in this slide. Tape the sides.

FRAME 10

Fold the top flap down and

FRAME 11

the bottom flap up and tape the flap.

FRAME 12

The ends of the box should look like this when you have completed them.

FRAME 13

Apply ribbon to the package as you see being done in the following slides.

FRAME 14

This application of ribbon is a basic crossover pattern.

FRAME 15

Tie the ribbon around the middle of the package, cross it over at the middle and tie it.

FRAME 16

The ends of ribbon are left and

FRAME 17

trimmed evenly leaving a sufficient amount for tying the bow to the package.

FRAME 18

Select a bow of appropriate color.

FRAME 19

Bows for commercial gift wrapping are pre-tied and are formed by separating the loops as shown in this and the next two slides.

FRAME 20

Attach the bow to the package by tying it with the two ends of the ribbon.

FRAME 21

Fluff the bow to

FRAME 22

complete the package.

FRAME 23

The End.

OPENING THE SALE

OBJECTIVE

Provided customers and merchandise, make a sales approach to each of the customers. Each of the approaches must meet the applicable criteria on the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that a successful sales approach will lead to a successful sales presentation.
--The students will realize that customers do form lasting impressions based on first impressions.
--The students will realize that people do want to be recognized, and for this reason the sales approach is important.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I THE SALES APPROACH	3
II DETERMINING CUSTOMER NEEDS	6
Student Self-Checks	
I WAYS OF APPROACHING CUSTOMERS	4
II DETERMINING CUSTOMER NEEDS	7
Instructor's Final Checklist	
OPENING THE SALE	8

CHECK-OUT ACTIVITY

Your instructor will provide you with three customers. Make a sales approach to each of the customers.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Richert, Meyer, Haines, and Harris, Retailing, Principles and Practices, Gregg/McGraw-Hill, St. Louis.

Samson, Little and Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati, 1982.

OPENING THE SALE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Discuss, in large or small groups, the importance of the sales approach. Emphasize: --First impressions --Personal attention to customer. --Store and self image --How to make an effective sales approach.	SUGGESTED REFERENCES Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Approaching the Customer," and "Determining Customer Needs" Ditzenberger and Kidney, Selling, Helping Customers Buy, "The Approach," and "Determining Customer Needs and Wants" Samson, Little and Wingate, Retail Merchandising Concepts and Applications, "The Approach," and "Determining Customers Needs and Wants."	
2	Discuss and demonstrate how to make sales approaches and how to determine customers needs and wants.	SUGGESTED RESOURCES Slide/Tape Presentation, FUD, "Overcoming Fear, Uncertainty and Doubt, Approach and Greeting." "Selling," NRMA	
3		Instruction Sheet I, THE SALES APPROACH	
4	Assist students with the Student Self-Check.	Student Self-Check I, WAYS OF APPROACHING CUSTOMERS	
5	Discuss in large or small groups how to determine customers needs and wants.	See LA #1.	
6		Instruction Sheet II, DETERMINING CUSTOMER NEEDS	

OPENING THE SALE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Assist students with Student Self-Check II.	Student Self-Check II, DETERMINING CUSTOMER NEEDS	
8	Use the Instructor's Final Checklist to evaluate the student's performance.	--Students for role playing situations --Merchandise --Copies of the Instructor's Final Checklist, OPENING THE SALE. (A Master Copy is provided in this section of the manual.)	

SELLING MERCHANDISE

FRAME 1

Title slide.

FRAME 2

I enjoy my job as a retail salesperson. I like it because it gives me an opportunity to help people satisfy their needs for merchandise. It is interesting because each customer has different needs and I have to treat each one differently as they shop for merchandise that will satisfy their individual desires. I also like the other tasks that I do as a salesperson. You have already learned many of these, such as: setting up displays, operating the cash register, writing department requests for merchandise, and keeping the department neat and attractive.

In the following slides I want to show you and discuss with you how I, as a salesperson in the men's suit department help my customers as they select merchandise that will satisfy their needs. I hope that I can help you acquire some selling techniques which will help you when you are employed as a salesperson in a retail store.

FRAME 3

Through personal experience, I have learned that my customers usually want the opportunity to look at the merchandise in my department and I usually hold back in making my approach so that they may do so. There are times, however, when the customer is in a hurry and will ask for immediate assistance. I do make it a personal rule to welcome each customer to the department with a greeting such as; "Good morning", or if I know them, I greet them by saying, "Hello Mr. Thompson, please let me know if I can assist you."

FRAME 4

I do want my customers to feel that I am in the department to help them and by my greeting them, I think they will know this.

FRAME 5

One of the clues that I watch for is when my customers stop and begin to closely examine a garment.

FRAME 6

When they do this I have found that this is an excellent time to make my sales approach. "The sport coat that you are looking at is an ideal Spring weight and it is the newest of the Acme line of sport coats. Do you have a specific color in mind?"

FRAME 7

After I have made my opening approach I stop talking and listen to what my customer has to say. I strongly believe that as a salesperson I must try to open as quickly as possible, a two-way line of communication with my customer. By listening alertly and attentively my customers will usually tell me their color preferences, their size and the style they want. When I first started selling, I thought that I had to tell each customer everything that I knew about each item of merchandise. After several customers disgustedly walked out of the department I became aware that I was doing something wrong. One of our experienced salespeople helped me by simply saying, "You must give your customers a chance to tell you what it is they want." Immediately my sales improved tremendously because I listened to my customers express their needs.

FRAME 8

When my customer and I find the item of merchandise that interest them, I do separate it from the other similiar items. By doing this my customers can see if it will meer their satisfcation and they are not confused by seeing it with many other surrounding items.

FRAME 9

I do believe if you can get your customers actively involved in the sale, that they often will sell themselves. Therefore, I assist my customer in trying on the garment when this is possible. If I were selling chairs or sofas, I would invite my customers to sit in the ones that interest them. Or, if I was selling cars, I would invite my customer to get behind the wheel and drive it. I do believe that more sales are completed by sales people who make an effort to get their customers actively involved in the sales demonstration.

FRAME 10

Selling also involves being of service to your customer. I make every effort to see that every garment that I sell fits my customers. If the item cannot be altered to fit, I tell my customer. If it can be, I tell them of our alteration service and cost. I want my customers to be thoroughly satisfied with their purchases. I don't want their friends telling them that they have made bad buying decisions because the garment does not fit.

FRAME 11

I always suggest that my customers view the garment in the mirror before they make a final buying decision. Again, the customer becomes actively involved in the selling process.

FRAME 12

I am a firm believer in the "natural sales close." The "natural close" happens when the customer is satisfied that the merchandise will satisfy their personal need. It occurs most frequently when I have listened closely to my customer express their needs and when I have honestly assisted them in fulfilling these and when the customer has become actively involved in the sales presentation. Customers will let me know when they wish me to close a sale by simply saying, "I like this one", or "how much did you say it is" or "when can you have it ready for me" or "yes, this is exactly what I want."

FRAME 13

When my customers express their wishes to close the sale, I immediately begin the final activities.

FRAME 14

Will this be cash or charge?

FRAME 15

I now stop and ask myself, have I been as much help to my customer as I can be? If my customer has not shown signs or has not indicated that they are in a hurry, I may say, "Sir, the coat you have purchased will coordinate excellently with a pair of slacks we have on special for $15.99." Or, I sometimes will take the garment over to the slacks and show the customer.

FRAME 16

If I still feel that the customer is receptive, I will show him other related merchandise such as shirts and

FRAME 17

ties. When I am selling related merchandise, I must always be alert to my customers reactions and I try to avoid over doing it. However, I do feel that selling the related items helps my customers; for if I did not make the suggestions they may have to make another trip to the store to purchase them. I do feel that I am performing a customer service when I am suggesting related items.

FRAME 18

I have always heard that no sale has been made until the paper work is complete and this is true. When performing these final activities, I try to do them efficiently, continuing to maintain good relations with my customers.

FRAME 19

If the purchase is to be charged, I accept my customer's charge card and I check it to determine that it is valid. If the amount exceeds the floor limit, I call the accounting department for purchase authorization.

FRAME 20

I then ring up each item on the cash register by reading each price tag carefully and keying the price into the register.

FRAME 21

After I have totaled the sale, I announce the total to my customer, accept payment or charge and

FRAME 22

with care, I package the merchandise.

FRAME 23

I then carefully hand the merchandise to each customer and thank each.

I am a retail salesperson and I enjoy performing selling activities. Yes, I feel that my job is very important because without us many items of merchandise would not be sold. I hope that as you learn the skills of selling that you will always remember to honestly serve the needs of your customers.

FRAME 24

The End.

PRESENTING PRODUCTION INFORMATION

OBJECTIVE

Provided merchandise and a customer who is seeking merchandise information, present the information to the customer. All applicable items on the Instructor's Final Checklist should be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that to be successful in selling merchandise one must learn and be able to present factual and technical information to customers.

--The students will realize that if they are to assist customers in fulfilling their needs for merchandise they will have to learn product information.

CONTENTS OF MODULE

Learning Activity Number

Instruction Sheets

I THE IMPORTANCE OF PRODUCT KNOWLEDGE 2
II CUSTOMERS WANT TO KNOW AND YOU WANT TO LEARN 3
III HOW TO GET PRODUCT INFORMATION 4
IV PRESENTING PRODUCT INFORMATION TO CUSTOMERS 6

Student Self-Check

I PRODUCT INFORMATION FACT SHEET 7

Instructor's Final Checklist

PRESENTING PRODUCT INFORMATION 9

CHECK-OUT ACTIVITY

Your instructor will provide you a customer who wishes to obtain information concerning a specific product. Present the product information to the customer.

PRESENTING PRODUCTION INFORMATION

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Ditzenberger and Kidney, Selling, Helping Customers Buy, "Product Information." Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Emphasizing Customer Benefits." Samson, Little, and Wingate, Retail Merchandising, Concepts and Applications." Ernest and Ashmun, Salesmanship Fundamentals, "Using Product Knowledge."	
2	Discuss in large or small groups the importance of product knowledge. Emphasize: --Salesperson, not order taker.	Instruction Sheet I, THE IMPORTANCE OF PRODUCT KNOWLEDGE SUGGESTED RESOURCE: NRMA "FUD": Selling Features and Benefits and Handling Objections, Slide/Tape presentation.	
3		Instruction Sheet II, CUSTOMERS WANT TO KNOW AND YOU WANT TO LEARN	
4		Instruction Sheet III, HOW TO GET PRODUCT INFORMATION	
5	Arrange for a local retail salesperson to discuss how to present product information to customers.	Instruction Sheet IV, PRESENTING PRODUCT INFORMATION TO CUSTOMERS	
6	Discuss with students how to gather product information. Show them references and resources.		

PRESENTING PRODUCTION INFORMATION

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
7	Assist students in completing Student Self-Check I. Have a variety of merchandise on hand from which students can make selections.	Student Self-Check I, PRODUCT INFORMATION FACT SHEET --Variety of merchandise	
8	Evaluate students' practice sessions. Discuss with students the strengths and weaknesses of their presentations. Have a wide variety of merchandise on hand from which students can make selections. Videotape students' practice sessions for self-evaluation. Tape record if videotaping is unavailable.	--Variety of merchandise --Videotape equipment --Tape recorder	
9	Use the Instructor's Final Checklist to evaluate each student's performance. Tape record or video record for students' self-evaluation.	--Copies of the Instructor's Final Checklist, PRESENTING PRODUCT INFORMATION. (A Master Copy is provided in this section.) --Tape recorder or video recorder --Merchandise	

PRESENTING AND DEMONSTRATING MERCHANDISE

OBJECTIVE

Provided a customer and merchandise, present and demonstrate the merchandise for the customer. The presentation and demonstration must include each of the applicable criteria on the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that when they are making a sales presentation they must always maintain a two-way system of communication.
--The students will realize that they must involve the customer in the sales presentation.
--The students will realize that they must always strive to assist their customers in fulfilling their needs.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I PRESENTING AND DEMONSTRATING MERCHANDISE.........	3
II PLANNING A SALES PRESENTATION....................	4
Student Self-Check	
I DESIGNING SALES PRESENTATIONS.....................	5
Instructor's Final Checklist	
PRESENTING AND DEMONSTRATING MERCHANDISE.............	7

CHECK-OUT ACTIVITY

Your instructor will provide you merchandise. Make a sales presentation and demonstration.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, Gregg/McGraw-Hill, St. Louis.

Samson, Little, Wingate, Retailing Merchandising Concepts and Applications, South-Western, Cincinnati, 1982.

PRESENTING AND DEMONSTRATING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES: Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Making the Sales Presentation." Ditzenberger and Kidney, Selling, Helping Customers Buy, "Making a Feature Benefit Presentation." Samson, Little and Wingate, Retailing Merchandising, Concepts and Applications, "Essentials of a Good Sales Presentation."	
2	Discuss and demonstrate in large or small groups how to present and demonstrate merchandise. Emphasize: --Customer involvement. --Appeal to senses. --Meeting each customer's needs. --Product knowledge and technology. Arrange for local retail salesperson to discuss and demonstrate how to present and demonstrate merchandise.	SUGGESTED RESOURCES: Slide/Tape Presentation, FUD, "Overcoming Fear, Uncertainty and Doubt, Selling Features, Benefits and Handling Objections." Slide/Tape Presentation: R-39, "Selling Merchandise."	
3		Instruction Sheet I, PRESENTING AND DEMONSTRATING MERCHANDISE	
4		Instruction Sheet II, PLANNING A SALES PRESENTATION	

PRESENTING AND DEMONSTRATING MERCHANDISE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Assist students in planning sales presentations and demonstrations. Select merchandise that can be demonstrated.		
	Assist students in designing sales demonstrations.	Student Self-Check I, DESIGNING SALES PRESENTATION.	
	Review their written plans	--Merchandise	
6	Set up tape recorders, VTR and camera for students practice.	--Tape recorders --VTR and camera --Merchandise	
	Supervise students practice sessions. Show students how to use tape recorders, TV cameras, and VTR. Evaluate students' practice session.		
7	Use the Instructor's Final Checklist to evaluate each student's performance.	Merchandise --Copies of the Instructor's Final Checklist, PRESENTING AND DEMONSTRATING MERCHANDISE. (A Master Copy is provided in this section of the manual.)	
	Video-tape or tape record each student's check-out activity.		

HANDLING CUSTOMER OBJECTIONS

OBJECTIVE

Provided examples of customer objections that could come up during sales presentations, handle each of the objections. All items on the Instructor's Final Checklist should be performed acceptably.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that the way they handle customer sales or product objections can be the difference between closing or losing a sale.

--The students will realize that if the customers' objections to the product or service are extremely strong that they may not complete the sale; however, if they have handled the sales activities with diplomacy and tact, the customer, in many cases, will return for their help in selecting other merchandise.

CONTENTS OF MODULE

Student Self-Check	Learning Activity Number
I HANDLING CUSTOMER OBJECTIONS	3
Instructor's Final Checklist	
HANDLING CUSTOMER OBJECTIONS	5

CHECK-OUT ACTIVITY

Your instructor will give you examples of customer sales objections. Answer each of the objections.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Ernest and Ashmun, Salesmanship Fundamentals, Gregg/McGraw-Hill, Saint Louis.

Richert, Meyer, Haines, Harris, Retailing, Principles and Practices, Gregg/McGraw-Hill, Saint Louis,

Samson, Little and Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati 1982.

HANDLING CUSTOMER OBJECTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Ernest, and Ashmun, Salesmanship Fundamentals, "Overcoming Objections and Excuses." Samson, Little, and Wingate, Retail Merchandising, Concepts and Applications, "Answering Objections." Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Overcoming Objections" Ditzenberger and Kidney, Selling, Helping Customers Buy, "Overcome Objections."	
2	Discuss and demonstrate in large or small groups how to handle customer objections. Emphasize: --Keeping composure. --Listening to objection. --Answering objection. honestly and with tact. --Analyzing the objection to determine real one.	Wingate and Nolan, Fundamentals of Selling, 9th edition, pp. 338-344. SUGGESTED RESOURCES Slide/Tape Presentation: FUD, "Overcoming Fear, Uncertainty, and Doubt," NRMA "Selling Features, Benefits and Handling Objections."	
3	Assist students with Student Self-Check I.	Student Self-Check I, HANDLING CUSTOMER OBJECTIONS --An Answer Key is provided in this section	
4	Design (write) some examples of customer objections for students to use for practice in handling objections:	--Tape recorder for student self-evaluation --Cassette tape	

HANDLING CUSTOMER OBJECTIONS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Have student tape record practice session. --Price objections --Competing product --Feature objections		
5	Use the Instructor's Final Checklist to evaluate each student's performance. Use tape recorder for student to perform self-evaluation. Design examples of customer objections for the student check-out activity.	--Tape recorder --Examples of customer --Copies of the Instructor's Final Checklist, HANDLING CUSTOMER OBJECTIONS. (A Master Copy is provided in this section.)	

STUDENT SELF-CHECK I

HANDLING CUSTOMER OBJECTIONS

ANSWER KEY

1. True
2. True
3. a.
   c.
   d.
   e.
   f.
   g.
   h.
   i.
   j.

CLOSING THE SALE

OBJECTIVE

Provided a customer, merchandise, and a sales ticket, close the sale of the merchandise to the customer. Each applicable item on the Instructor's Final Checklist must be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that if they have approached their customers in a positive manner, if they have opened the sale in a manner that is pleasing to the customer, if they have presented a sufficient amount of production information, and if they had adequately handled each customer objection then the sales close will often come about naturally.

--The students will realize that a sales has not been made until it is closed.

--The students will realize that a sale has not been closed until the paper work is finished.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I THE IMPORTANCE OF CLOSING A SALE..................	2
II WAYS TO CLOSE SALES...............................	3
Student Self-Check	
I CLOSING SALES.......................................	5
Instructor's Final Checklist	
CLOSING THE SALE......................................	8

CHECK-OUT ACTIVITY

Your instructor will provide you a customter, merchandise, and a sales ticket. Close the sale of the merchandise.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Samson, Little, Wingate, Retail Merchandising Concepts and Applications, South-Western, Cincinnati, 1982.

CLOSING THE SALE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Ditzenberger and Kidney, Selling, Helping Customers Buy, "Closing The Sale." Samson, Little, Wingate, Retail Merchandising Concepts and Applications, "Closing The Sale."	
2	Discuss in large or small groups "The Importance of Closing The Sale."	Instruction Sheet I, THE IMPORTANCE OF CLOSING A SALE	
3		Instruction Sheet II, WAYS TO CLOSE SALES	
4	Discuss and demonstrate in large or small groups ways to close sales. Emphasize: --Sales are not made, until they are closed. --Sales are not complete until the paper work is finished. --Sales tickets.	SUGGESTED RESOURCES Slide/Tape Presentation, FUD, "Fear, Uncertainty and Doubt." Closing and Customer Service. --Sales tickets	
5	Assist students with Self-Check I.	Student Self-Check I, CLOSING SALES (Answers are not required.)	
6	Design case problems for use in practicing closing sales. Observe student practice.	--Practice case problems --Tape recorder and blank cassette tapes	
7	Arrange for students' demonstrations.	--Merchandise --Sales ticket --Person to role play customer	

CLOSING THE SALE

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
8	Use Instructor's Final Checklist to evaluate each student's performance. Tape record each student's performance for student to evaluate Check-Out Activity.	--Merchandise --Tape recorder and blank tapes --Sales tickets --Person to role play customer. --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section of the manual.)	

SUGGESTIVE SELLING

OBJECTIVE

Provided a customer who has purchased an item(s) of merchandise, sell the customer the related items of merchandise. All items on the Instructor's Final Checklist should be performed acceptably.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will realize that suggested selling should be used as a way to provide service to their customers.

--The students will realize that suggestive selling, when used properly, will benefit their cutomers.

CONTENTS OF MODULE

Student Self-Check	Learning Activity Number
I SUGGESTIVE SELLING	2
Instructor's Final Checklist	
SUGGESTIVE SELLING	5

CHECK-OUT ACTIVITY

Your instructor will provide you with a customer who has purchased an item of merchandise. Suggestive sell additional items of merchandise to the customer.

SUGGESTED REFERENCES

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Meyer, Haines and Harris, Retailing, Principles and Practices, Gregg/McGraw-Hill, Saint Louis.

Samson, Little and Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati, 1982.

SUGGESTIVE SELLING

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Meyer, Haines, and Harris, Retailing Principles and Practices, "Suggestion Selling." Samson, Little, and Wingate, Retail Merchandising, Concepts and Applications, "Suggestive Selling." Ditzenberger and Kidney, Selling, Helping Customers Buy, "Suggestion Selling and Reassurance."	
2	Assist students with Student Self-Check I.	Student Self-Check I, SUGGESTIVE SELLING --An Answer Key is provided	
3	Discuss and demonstrate in large or small groups how to use suggestive selling as a service to better serve the needs of the customer.	Merchandise Sales ticket FUD, Fear, Uncertainty and Doubt, "Suggestive and Alternative Selling," NRMA slide/tape presentation.	
4	Have students tape record their practice session. Play tapes for self-evaluation. Assist students during their practice session. Video-tape, if possible.	--Merchandise --Case problems --Video camera and tape --Tape recorder and tape	
5	Use Instructor's Final Checklist to evaluate each student's performance.	--Copies of the Instructor's Final Checklist, SUGGESTIVE SELLING. (A Master Copy is provided.)	

SUGGESTIVE SELLING

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Arrange to provide a customer for student's Check-Out Activity. Video-tape, or tape record, if possible.	--Customer --Merchandise --Video camera and tape --Tape recorder and tape	

STUDENT SELF-CHECK I

SUGGESTIVE SELLING

ANSWER KEY

1. a, b, c, d, e, f, g

2. a. –
   b. +
   c. –
   d. +

3. b.
   c.
   d.

4. Suggested related items (students will suggested others)

   a. Reel, lures, line for reel, tackle box, worm box, minnow bucket etc.
   b. Blouse, jewelry, scarf, shoes, etc.
   c. Motor, seats, life preservers, food coolers, etc.
   d. Caulking, brushes, ladder, paint scraper, sand paper, etc.
   e. French fries, cola, other beverages, dessert, etc.
   f. Socks, hand bag for women, shoe polish, etc.
   g. Shirts, ties, belt, etc.
   h. Cassette tapes, speakers.
   i. Lenses, flash attachment, film, carrying case, flash bulbs, slide viewer, etc.

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

OBJECTIVES

(1) Given customers who have questions concerning store policy, store services, in-store locations, or customer facilities, answer each of the questions. All applicable items on the Instructor's Final Checklist must be acceptably performed.

(2) Given four customers who have complaints, orally handle each of the complaints. All appliable items on the Instructor's Final Checklist must be acceptably performed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that one of the most important skills to develop for success in retailing occupations is human relations skills.

--The students will realize that customers will have complaints other than those that are merchandise connected.

--The students will realize that good human relation skills will reflect both a good personal image and a good store image.

--The students will realize the importance of knowing department locations, store policies, and other information that will help them answer customer questions.

CONTENTS OF MODULE

Learning Activity Number

Instruction Sheet

I ANSWERING CUSTOMERS' QUESTIONS.................... 2
II HANDLING CUSTOMERS' COMPLAINTS.................... 7

Student Self-Checks

I ANSWERING CUSTOMERS' QUESTIONS.................... 4
II PRACTICE IN ANSWERING CUSTOMERS' QUESTIONS....... 5
III PRACTICE IN ADJUSTING CUSTOMERS' COMPLAINTS...... 9

Instructor's Final Checklist

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS.. 10

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you customers who will ask you questions concerning locations of merchandise, store services, and store policies. Answer each of the questions.

(2) Your instructor will provide you four customers with complaints. Orally adjust each of the complaints.

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

SUGGESTED REFERENCES

Wingate, Nolan, Fundamentals of Selling, South-Western, Cincinnati, 1976.

Ditzenberger and Kidney, Selling, Helping Customers Buy, South-Western, Cincinnati, 1981.

Richert, Meyer, Haines, Harris, Retailing Principles and Practices, Gregg/McGraw-Hill, St. Louis, 1974.

Samson, Little, Wingate, Retail Merchandising, Concepts and Applications, South-Western, Cincinnati, 1982.

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	This is an excellent time to "highlight" human relations skills.	Suggested References: Wingate and Nolan, Fundamentals of Selling, "Handling Complaints and Controlling Merchandise Shortages," 1976.	
2		Instruction Sheet I, ANSWERING CUSTOMERS' QUESTIONS	
3	Discuss in large or small groups the information in Instruction Sheet I. Emphasize: --Performing Customer Service. --Self-image. --Human relations skills. --Store image		
4	Assist students with Student Self-Check I.	Student Self-Check I, ANSWERING CUSTOMERS' QUESTIONS --An Answer Key is provided in this section of the manual.	
5	Help students set up role playing situations.	Student Self-Check II, PRACTICE IN ANSWERING CUSTOMERS' QUESTIONS --An Answer Key is provided in this section of the manual.	
6		Suggested References: Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Adjustment Policies and Procedures." Samson, Little and Wingate, Retail Merchandising, Concepts and Applications.	

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
		Eggland and Williams, Human Relations in Business, pp. 126-140. Ditzenberger and Kidney, Selling, Helping Customers Buy, "Handling Customer Complaints."	
7		Instruction Sheet II, HANDLING CUSTOMERS' COMPLAINTS	
8	Discuss and demonstrate in large or small groups how to adjust customer complaints. Emphasize: --Listening to complaints. --Maintaining calm and customer good will. Role play adjusting complaints.	SUGGESTED RESOURCE: Filmstrip/Cassette, "Handling Customer Complaints," by Singer.	
9	Write additional examples of typical customer complaints for students to use. Have students tape sessions for their personal review.	Student Self-Check III, PRACTICE IN ADJUSTING CUSTOMERS' COMPLAINTS --Tape recorder --Tapes	
10	Use the Instructor's Final Checklist to evaluate each student's performance.	--Four examples of customer complaints --Copies of the Instructor's Final Checklist, ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS. (A Master Copy is provided in this section of the manual.) --See suggestions for the CHECK-OUT ACTIVITY in this section.	

STUDENT SELF-CHECK I

ANSWERING CUSTOMERS' QUESTIONS

ANSWER KEY

1. B
2. B
3. B
4. A
5. D
6. C
7. B
8. C
9. A
10. C

CHECK-OUT ACTIVITY SHEET

ANSWERING CUSTOMERS' QUESTIONS

Directions to Instructor: Listed below are questions that customers ask employees of retail establishments. It is, as you know, important that employees develop good customer relations skills. The employees ability to answer customers' questions concerning location of merchandise, store policies and store services is very important to the retail establishments image. It is suggested that this check-out activity be conducted as a role playing one.

The student who is being checked out should be playing the role of an employee of a retail establishment. Each of the questions should be given to a different student, and he/she should be instructed to play the role of a customer. Your role will be that of an observer, and you should use the Instructor's Final Checklist to guide your evaluation of the student's performance.

QUESTIONS ASKED BY CUSTOMERS

1. Please, can you tell me what your store hours are?
2. A friend bought this for me, but it is the wrong size. May I exchange it?
3. Where is the credit department?
4. Will you be able to deliver this TV set?
5. I am buying this as a gift for a friend, but I don't have time to wrap it. Will you gift wrap it for me?
6. I have recently moved to this town. Does your store offer charge accounts?
7. Can you tell me how to get to the hardware department?
8. If this shirt does not fit my husband, may I return it for the correct size?
9. Does your store have repair service?
10. Do you accept bank cards?
11. Will you cash my personal check?

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

OBJECTIVES

(1) Provided a case problem involving shoplifting answer the questions concerning the incident. Each question should be answered correctly.

(2) List seven steps that you will practice to prevent shoplifting. this must be done with 90% accuracy.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that shoplifting costs both the retailers and consumers many dollars a year.

--The students will realize that as salespeople and stock clerks, they can help prevent shoplifting by performing specific security activities and by performing specific sales activities.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I METHODS USED BY SHOPLIFTERS	3
II PREVENTING SHOPLIFTING	4
III DO'S AND DON'TS FOR HANDLING SHOPLIFTING SUSPECTS	5
Student Self-Check	
I DETECTING AND REPORTING SHOPLIFTING	6
Instructor's Final Checklist	
PREVENTING, DETECTING, AND REPORTING SHOPLIFTING	7

CHECK-OUT ACTIVITIES

(1) Your instructor will provide you with a case problem involving shoplifting. Answer the questions concerning the incident.

(2) List seven steps that you will practice to prevent shoplifting.

PREVENTING, DETECTING AND REPORTING SHOPLIFTING

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		SUGGESTED REFERENCES Samson, Wingate, and Nolan, Retail Merchandise, Concepts and Applications, "Reducing Shoplifting and Theft." Richert, Meyer, Haines, and Harris, Retailing Principles and Practices, "Preventing Stock Shortages and Theft." Ditzenberger, and Kidney, Selling, Helping Customers Buy, "Store Losses."	
2	Discuss in large or small groups preventing, detecting, and reporting shoplifting. Emphasize: --Greeting each and every customer --Security measures --Following store procedures --Following store procedures when reporting --Observation --What to do if shoplifting is observed The Crime Prevention Section of the Kentucky State Police, Airport Road, Frankfort, Kentucky 40601, has an excellent resource and reference library of audio-visual materials for the use of Kentucky teachers. Write for their catalog.	Filmstrip/Cassette Presentation, "Security in Retail Stores," by Singer. SUGGESTED RESOURCES --Local police department --Audio/Visuals, from the Kentucky State Police	
3		Instruction Sheet I, METHODS USED BY SHOPLIFTERS	

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4		Instruction Sheet II, PREVENTING SHOPLIFTING	
5		Instruction Sheet III, DO'S AND DON'TS FOR HANDLING SHOPLIFTING SUSPECTS	
6	Assist students in completing Student Self-Check I.	Student Self-Check I, DETECTING, AND REPORTING SHOPLIFTING --Answer Key is included in this section.	
7	Use the Instructor's Final Checklist to evaluate each student's performance. Use the Answer Key to check student's answers.	--Case Problem --Copies of Instructor's Final Checklist, DETECTING AND REPORTING SHOPLIFTING --Copies of the Check-Out Activity Sheet. (A Master Copy and Answer Key are provided in this section of the manual.)	

CHECK-OUT ACTIVITY SHEET

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

John Smith is a stock person at a large discount store. As he was checking the inventory, he noticed a customer who looked very nervous, was dressed in a large, loose fitting coat, and had a shopping bag from another store. The customer was constantly watching to see if anyone was looking at him and would wander around, then come back to a certain spot in the aisle. John approached the customer and asked if he needed an assistance, and the customer replied, "NO". John continued his work, but also kept a watchful eye on the customer. The customer again returned to the same spot in the aisle and placed an item in the shopping bag and another under his coat. The customer hurriedly started toward the exit.

From this information, answer the following questions:

1. List at least three clues that alerted John that the customer could be a possible shoplifter.
2. After asking if the customer needed help and the answer was "NO," what three things should John have done?
3. Immediately after John saw the customer conceal the items, should he have stopped the customer, or taken the merchandise back, and accused the customer of being a thief? What should John do?

STUDENT SELF-CHECK I

DETECTING AND REPORTING SHOPLIFTING

ANSWERS

1. yes
2. yes
3. yes
4. no
5. yes
6. yes
7. yes
8. yes
9. yes
10. yes
11. yes
12. yes

CHECK-OUT ACTIVITY SHEET

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

ANSWERS

1. Any three of the following:
    a. Nervous
    b. Large, loose fitting clothes
    c. Shopping bag
    d. Looking to see if anyone is watching
    e. Wandering, but coming back to the same location
    f. Did not want any assistance

2. Keep the suspect under surveillance, get the assistance of other employees, notify the store manager or proper security officers.

3. No, John should not have stopped the customer, taken the merchandise, or accused the customer of being a thief. By taking the merchandise, before the customer had a chance to pay for it, the customer could have said he was just placing it there while he finished his shopping. By accusing the customer, especially while still in the store and not past the last check out counter, the customer could bring suit against John and the store for libel or slander. It is always best to report the shoplifting to management or security and let them do the apprehending.

Seven Ways to Prevent Shoplifting

1. Greet each customer as they enter department.
2. Lock security display cases.
3. Keep a neat department.
4. Know kinds of and amount of merchandise in department.
5. Show only one expensive item of merchandise at one time.
6. Be observant at all times.
7. Avoid setting up displays that will block view in department/store.
8. Follow store policies concerning prevention of shoplifting.

ASSISTING IN TRAINING NEW EMPLOYEES

OBJECTIVE

Provided a retailing task and a student who cannot perform the tasks, train the student to perform the task. All items on the Instructor's Final Checklist should be performed acceptably.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The students will realize that they will be helped in learning the skills of retailing by other store employees; therefore, it will be one of their responsibilities to assist others in learning these skills.

--The students will realize that they must acquire the following personal characteristics if they are to successfully help others learn the skills of retailing; patience, willingness to discuss and demonstrate their skills in performing specific tasks, kindness, willingness to repeat instructions, and many others.

CONTENTS OF MODULE

Learning Activity Number

Instruction Sheet

I ASSISTING IN TRAINING NEW EMPLOYEES 1

Student Self-Check

I ASSISTING IN TRAINING NEW EMPLOYEES 3

Instructor's Final Checklist

ASSISTING IN TRAINING NEW EMPLOYEES 5

CHECK-OUT ACTIVITY

Your instructor will provide a retailing task and a student. Train the student to perform the task.

ASSISTING IN TRAINING NEW EMPLOYEES

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1		Instruction Sheet I, ASSISTING IN TRAINING NEW EMPLOYEES	
2	Discuss in large or small groups how to train new employees.		
3	Assist students with Student Self-Check I.	Student Self-Check I, ASSISTING IN TRAINING NEW EMPLOYEES --An Answer Key is provided.	
4	Prepare training case problems for your students to use for training other students. Supervise the training sessions. Have students to submit training plans before they begin the training sessions. Ask the student-trainers to discuss how they are going to help train their new employee.	--Case problems (specific tasks) --Trainee	
5	Use the Instructor's Final Checklist to evaluate each student's performance.	--Student to train --Equipment necessary for performing task --Copies of the Instructor's Final Checklist. (A Master Copy is provided in this section.)	

STUDENT SELF-CHECK I

ASSISTING IN TRAINING NEW EMPLOYEES

ANSWERS

2.

3.

4.

5.

6.

1.

8.

7.

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RETAILING

INSTRUCTOR'S PACKAGE

MODULES R 1-45

STUDENT PACKAGE

Kentucky Department of Education
Printed With State Funds

RETAILING

RETAILING: PAST, PRESENT, AND FUTURE

INTRODUCTION

You have decided to enroll in a vocational education instructional program called "retailing." You are probably wondering, "What Is It All About?" "What am I going to be able to do when I finish?" To help you better understand what retailing is, you need to know how retailing has developed from the days of bartering to the present day of shopping malls and computers. You also need to know what the future holds for retailing and for those who are employed in the many retailing occupations. In this module, you will learn about retailing: its past, its present, and its future.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a test concerning the history of retailing, its present, and its future, answer the questions. The test must be completed with 100% accuracy.

Kentucky Department of Education

1982-83

VOCABULARY

Barter - the act of a person exchanging goods or services for another person's goods or services.

Exported merchandise - merchandise that is sent to another country.

Imported merchandise - merchandise that is brought into a country.

Industrial Revolution - a period of time in history when manufacturing began its rise to importance in the economy of a nation.

Merchandise - goods that are bought and sold in business.

Retailing - an industry with a primary objective of offering people merchandise at a convenient location, in the amount that they need, at a time when they need it, and at a price they can pay.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES

1. READ about the development of modern retailing. Your instructor will provide the reference(s).

   (or) ____________________

2. CHECK YOUR KNOWLEDGE of the historical developments of retailing by completing Student Self-Check I, RETAILING: THE PAST, THE PRESENT, AND THE FUTURE.

3. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

STUDENT SELF-CHECK I

RETAILING: THE PAST, THE PRESENT, AND THE FUTURE

Directions: You have read about the history of retailing--retailing as it is now and as it could be in the future. Check your knowledge of what you have read by answering the following questions. Use a separate sheet of paper for your answers. When you have finished, ask your instructor for the answer key to see if your answers are correct.

1. Retailing began in Colonial America because (write the letter of the correct answer):
    a. Settlers did not have personal needs and could produce everything they needed.
    b. The settlers had personal needs which they could not satisfy because they had to spend their time performing other tasks.
    c. The settlers wanted to spend their free time watching television.
    d. There was an oversupply of horses, mules, and wagons which could be used for transporting merchandise to the settlers.
2. The first retailers in Colonial America used horse- and mule-drawn wagons to carry merchandise to the settlers. (Write + if the statement is true; write - if the statement is false.)
3. Retailing began because people did not have the time to produce everything they needed, and they were willing to exchange their produced items for necessary items. (Write + if the statement is true; write - if the statement is false.)
4. When a person exchanges an item of merchandise that he/she has for an item of merchandise owned by another person, this is called (write the letter of the correct answer):
    a. cash sale.
    b. charge sale.
    c. cash flow.
    d. barter.
5. Merchandise brought into a country from another country is called (write the letter of the correct answer):
    a. exported merchandise.
    b. reported merchandise.
    c. left-over merchandise.
    d. inventoried merchandise.
    e. imported merchandise.
6. Trading posts were one of the first permanent retail stores in America. (Write + if the statement is true, write - if the statement is false.)

STUDENT SELF-CHECK I, (page 2)

7. At the beginning of the Industrial Revolution, many people moved from farms and rural areas to towns and cities. They could no longer supply themselves with basic needs such as food, clothing, and furniture. Because of this, retailing began to grow and increase in importance as a means for supplying the people with their needs for merchandise. (Write + if the statement is true; write - if the statement is false.)

8. Shopping malls and centers have been built because a large number of people moved from the center of towns and cities to suburban areas and the retailers, to better serve the needs of the suburban people, moved from the center of towns and cities to areas near the suburbs. (Write + if the statement is true; write - if the statement is false.)

9. Better methods of transportation of merchandise and produce have helped make more goods available to people in every area of the United States. (Write + if the statement is true; write - if the statement is false.)

10. Retailing has a fascinating history. It has developed from the trading posts and the horse- and mule-drawn wagons to the present day air-conditioned malls and shopping centers where people can shop in comfort and with convenience. Retailing, however, will continue to change as it meets the needs of the people it serves. The future in a retailing career can be a rewarding adventure if you become a part of its constant search for better methods of serving the needs of people. What future changes for retailing can you think of which could help retailers better meet the needs of customers? Write these suggestions for future changes on your answer sheet. (Discuss your suggestions with your instructor.)

INSTRUCTOR'S FINAL CHECKLIST

RETAILING: PAST, PRESENT, AND FUTURE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
The student completed the test about the history of retailing with 100% accuracy................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, RETAILING: PAST, PRESENT, AND FUTURE.

Your instructor will give you a test concerning the history of retailing, its present, and its future. Answer the questions.

RETAILING

RETAILING OCCUPATIONS

INTRODUCTION

Retailing is a fascinating industry. It offers the interested person a variety of occupational opportunities and career challenges. In this module, you will learn about the kinds of jobs that are available in retailing and about the variety of tasks performed by people employed in these occupations.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a list of occupations and tasks, correctly identify the retailing occupations and the retailing tasks.

Kentucky Department of Education

1982-83

VOCABULARY

Chain stores - a group of stores that are similiar under single ownership.

Department store - a store that handles a variety of merchandise under one roof and is directed by a central management team.

Finance and control division - the section of a department store that manages the monetary policies.

Independent store - a single store that is under single ownership.

Personnel management division - the section of the store that manages employee relations.

Sales promotion division - the section of a store that manages the promotion of products such as; advertising, fashion shows etc.

Store operation division - the section of the store that is responsible for the physical operation of the store such as; shipping and receiving, delivery, and store maintenance etc.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES

1. READ about the retailing occupations. Your instructor will provide the reference(s). LIST the retailing occupations that you read about.

   (or)____

2. LISTEN to your instructor discuss the kinds of jobs in retailing and the tasks that are performed by people employed in retailing occupations. (You may want to ask about the careers you listed in Learning Activity #1.)

   (or)____

3. DESIGN a plan, with the help of your instructor, to interview three people employed in retailing. You will need to ask about the tools, equipment, and materials they use and the tasks they perform on the job.

   (or)____

4. INTERVIEW three people employed in three different retailing occupations.

   (or)____

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY on the back cover.

INSTRUCTOR'S FINAL CHECKLIST

RETAILING OCCUPATIONS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

The student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Correctly identified each retailing occupation	☐	☐	☐	☐
b. Correctly identified each retailing task	☐	☐	☐	☐

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, RETAILING OCCUPATIONS.

Your instructor will provide a list of retailing occupations and tasks. Identify the occupations and tasks.

RETAILING

INTRODUCTION TO THE RETAILING CURRICULUM

INTRODUCTION

Retailing can offer an exciting, interesting, and rewarding lifetime of occupational experiences. As a student in this vocational program, you will be studying and applying various principles of retailing. In this module, you will learn about the retailing curriculum.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a test about the retailing curriculum, answer the question. The test must be completed with 100% accuracy.

VOCABULARY

Curriculum - the subject matter of a specific educational program.

Task - a specific unit of work performed by a person employed in a specific occupation. This unit of work has a definite beginning and ending.

Practice - time spent by a learner to acquire or to improve a skill(s).

Reference - a written source used by learners to gain information.

Resource - a source used by learners to gain information i.c. film, slides, tapes, workers, teacher, written materials etc.

Check-Out Activity - a test to determine if the learner can perform a specific task.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES

1. LISTEN to your instructor discuss the presentation: "Introduction to the Retailing Curriculum."

   (or) ____________________

2. VIEW slide-tape presentation R-3, "Introduction to the Retailing Curriculum."

   (or) ____________________

3. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, THE RETAILING CURRICULUM.

4. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

STUDENT SELF-CHECK I

THE RETAILING CURRICULUM

Directions: Answer the following questions on a separate sheet of paper. Discuss your answers with your instructor.

1. The retailing curriculum will help you learn the skills of three retailing occupations. The three are:

   a. ____________________
   b. ____________________
   c. ____________________

2. You will be learning to perform specific retailing tasks. Your instructor has given you a list of these. List three retailing occupations and three tasks for each occupation.

   A. ______________________________ (Job Title)
      1. ____
      2. ____
      3. ____

   B. ______________________________ (Job Title)
      1. ____
      2. ____
      3. ____

   C. ______________________________ (Job Title)
      1. ____
      2. ____
      3. ____

3. You have been told that you will learn the retailing tasks by reading about them. You will also learn how to perform them by (a) _____, (b) _____.

4. By enrolling in the retailing program, you will be learning the tasks of (1) Sales- people, (2) __________, and (3) __________.

5. Briefly describe what the people employed in the following retailing occupations do on the job.

   a. Receiving clerk
   b. Salesperson
   c. Stock clerk

6. I have elected to take Retailing I and II because:

INSTRUCTOR'S FINAL CHECKLIST

INTRODUCTION TO THE RETAILING CURRICULUM

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
The student completed the test about the retailing curriculum with 100% accuracy........	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, INTRODUCTION TO THE RETAILING CURRICULUM.

Your instructor will give you a test concerning the retailing curriculum. Answer the questions.

RETAILING

DECA

INTRODUCTION

As a student of retailing you are eligible to become a member of the Distributive Education Clubs of America (DECA), a youth organization that offers you many opportunities to learn the skills of leadership, social development, civic consciousness, vocational pride, and understanding. DECA is a non-profit, non-political, and non-sectarian youth organization. When you are a member of DECA, you are a member of your local, state, and national organization. In this module, you will learn about DECA, its objectives and how you will benefit as a member.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given ten questions concerning DECA, answer the questions without error.

Kentucky Department of Education

1982-83

VOCABULARY

DECA - an acronym for Distributive Education Clubs of America, a youth club organized for the purpose of promoting student interest in the retailing occupations.

Competitive events - DECA activities that are designed to give students retailing learning experiences.

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LEARNING ACTIVITIES

1. LISTEN as your instructor discusses DECA and how you can benefit as a member. READ the brochures concerning DECA that your instructor will give you.
2. VIEW the film, "DECA is for Everyone."
3. READ Instruction Sheet I, DECA.

   (or) ____
4. CHECK YOUR KNOWLEDGE by taking Student Self-Check I, DECA.
5. PARTICIPATE in a meeting to organize your DECA student organization.
6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

INSTRUCTION SHEET I

DECA

DECA is the acronym for Distributive Education Clubs of America. To be a part of the Distributive Education Clubs of America, you have to be enrolled in a Marketing and Distributive Education Program.

The DECA program is co-curricular with the Marketing and Distributive Education Program. What does this mean? It means that the activities in which a student participates as a club member are additional learning experiences for the skills and knowledges being learned in the classroom. The competitive events held at the regional, state, and national level are opportunities for students to demonstrate their ability to perform the skills learned in the classroom. They also provide an opportunity to gain recognition for these skills.

Being involved in the DECA activities gives Marketing and Distributive Education students opportunities to travel; meet new people; gain recognition; and grow in attitudes, skills, and knowledge.

There are four areas of development stressed by DECA. One is vocational understanding. The student in the Marketing and Distributive program should develop a thorough understanding of what is expected in the marketing occupations, and a definite knowledge of what is expected by employers. The marketing student should be able to tell any prospective employer how he/she can benefit the employer's company.

Another area of understanding is leadership development. Marketing students should develop an appreciation for the value of leadership in our society. DECA stresses that in order to be a valuable member in society, students should prepare themselves to assume leadership roles in their communities. You will have many opportunities to develop knowledges and skills which will enable you to perform as a leader in civic clubs, community groups, and school organizations.

Social development is a third area of development. One of the Marketing goals is to help students become poised, comfortable individuals in social settings. In your DECA activities, you will have opportunities to attend banquets, make speeches, go to dances, give assembly programs, and participate in many other activities which help you develop socially. While participating in these activities, you will have lots of fun and experiences which can help you become a better socially adjusted person.

Civic consciousness is a fourth area of development. Many opportunities are available which help students develop a sense of service toward their communities and to help individuals who are less fortunate than themselves. This type of awareness is demonstrated by chapter members holding special fund raising drives for worthy causes such as Muscular Dystrophy drives, visiting homes for senior citizens, conducting campaigns for getting out the voters for elections, and many, many more. The results of these efforts are deeply appreciated by the recipients and give the student a feeling of well being for having made a worthwhile contribution.

INSTRUCTION SHEET I, (page 2)

The Marketing and Distributive Education teacher is your local chapter advisor. He/she is a valuable resource person in helping you understand more about DECA and its organization.

Your state organization is the State Association of DECA. Your state reporter is responsible for publishing a newsletter which is designed to acquaint you with what is going on in the state. Your state advisor sends your chapter advisor many types of information throughout the year. This information will be shared with you. You will also be advised as to what activities are to be held on the state level. The national organization publishes handbooks, newsletters, and many other items which keep you informed about the total DECA program.

Ask your local advisor for references covering the latest information about DECA.

Your involvement in DECA while a Marketing and Distributive Education student can be a very rewarding experience.

STUDENT SELF-CHECK I

DECA

Directions: Write your answers on a separate sheet of paper. When you have finished, check your answers according to the procedures established by your instructor.

1. To be a member of DECA, a student must be:

   a. A junior in high school
   b. 16 years of age
   c. Enrolled in Marketing and Distributive Education
   d. Planning to attend college

2. DECA is the _____ for Distributive Education Clubs of America.

   a. Hononym
   b. Synonym
   c. Acronym
   d. Antonym

3. DECA gives students opportunities to gain knowledge in:

   a. Civic understanding
   b. Vocational understanding
   c. Social intelligence
   d. Leadership ability
   e. All of the above
   f. None of the above

4. The person who serves as the Advisor for the local DECA chapter is the:

   a. Guidance Counselor
   b. Principal
   c. Business Education Teacher
   d. None of the above
   e. All of the above

5. Helping with a Muscular Dystrophy drive is an example of:

   a. Leadership ability
   b. Social intelligence
   c. Civic consciousness
   d. Vocational understanding

6. Your state organization is:

   a. A chapter
   b. An association
   c. A club
   d. All of the above
   e. None of the above

STUDENT SELF-CHECK I, (page 2)

---

7. A student with vocational understanding should be able to demonstrate that he/she understands:

   a. What the employer expects
   b. That a high school diploma is necessary to work in marketing occupations
   c. How the company can benefit from his/her services
   d. Both a and c
   e. Both b and d

8. Your local organization is a _____ of the Distributive Education Clubs of America.

   a. Chapter
   b. Club
   c. Association

9. Your national organization publishes _____ to keep you informed of DECA activities.

   a. Newsletters
   b. Handbooks
   c. Both a and b

10. DECA is _____ activity.

   a. A curricular
   b. An extra-curricular
   c. Co-curricular

INSTRUCTOR'S FINAL CHECKLIST

DECA

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
The student correctly answered each of the questions concerning DECA......................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you have gone through the activity your instructor will rate your performance using the Instructor's Final Checklist, DECA.

Your instructor will give you a test concerning DECA. Answer each of the questions.

RETAILING

ORDERING MERCHANDISE

INTRODUCTION

Retail establishments must have a large assortment of merchandise on hand to serve their customers' needs. To meet these customer needs, the retailer has to order merchandise continuously in order to maintain an adequate inventory. Vendors must be made aware of the retailer's needs for merchandise. A document called a "purchase order" is used by the retailer to notify the vendor that merchandise is needed. Salespeople and stock clerks may be asked to order merchandise. In this module, you will learn how to write a purchase order.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a department requisition form, a purchase order blank, and catalogs from suppliers (vendors), prepare a purchase order for merchandise. The purchase order should be written legibly, and all information needed for ordering the merchandise should be included.

Kentucky Department of Education

1982-83

VOCABULARY

Department requisition - a written request completed by a department employee for merchandise to be ordered.

Purchase order - a written request sent to a vendor to purchase merchandise.

Vendor (supplier) - one who sells merchandise to others. In this module "vendor" will refer to the wholesaler or the manufacturer.

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LEARNING ACTIVITIES

1. READ about preparing purchase orders. Your instructor will provide a reference.

   (or)____

2. LISTEN and OBSERVE as your instructor discusses and demonstrates "How to Order Merchandise from Vendors."

3. CHECK YOUR KNOWLEDGE about preparing purchase orders by taking Student Self-Check I, PREPARING PURCHASE ORDERS FOR MERCHANDISE.

4. READ Instruction Sheet I, THE PURCHASE REQUISITION AND THE PURCHASE ORDER

   (or)____

5. CHECK YOUR KNOWLEDGE by taking Student Self-Check II, WRITING PURCHASE ORDERS.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

STUDENT SELF-CHECK I

PREPARING PURCHASE ORDERS FOR MERCHANDISE

Directions: You have learned that if a retail establishment is to have merchandise to meet the needs of its customers, someone must order the items. The following questions are designed to check your knowledge about how to order merchandise. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

1. The person who usually orders merchandise for a large retail establishment is:

   a. The receiving clerk.
   b. The alterationists.
   c. The marker.
   d. The buyer.
   e. The stock clerk.

2. Before the buyer writes a purchase order, a:

   a. Purchase requisition must be completed by the department manager.
   b. Stock report must be completed by the department manager.

3. In a small store purchase orders maybe written by three people. These three are:

   a. Salespeople.
   b. Owner.
   c. Manager.
   d. Alterationist.
   e. Customers.

4. Companies that sell merchandise to retail establishments are called:

   a. Vendors or suppliers.
   b. Buyers or purchasers.

5. A person who buys merchandise for retail establishments must ask certain questions when purchasing items. Which questions must a buyer ask:

   a. What needs do the customers of this store have?
   b. What is the least expensive way to have these items transported to this store?
   c. How many should I buy to serve the needs of my customers?
   d. What is the best time to purchase these items?
   e. What supplier or vendor can offer the items at a price that the customers of the store can and will buy?
   f. How quickly does the store need the merchandise?

STUDENT SELF-CHECK I, (page 2)

6. After the buyer receives a requisition from a department to buy specific merchandise, a purchase order is written by the buyer. On this form the buyer must write specific information. Which items must be included on a purchase order:

   a. Date the order is written.
   b. Name of the vendor.
   c. Store's name and address.
   d. Vendor's name and address.
   e. Style of items ordered.
   f. Number of each style.
   g. Sizes in each style.
   h. Color
   i. Cost of each
   j. Total cost of the order
   k. Requested delivery date
   l. Method of delivery

INSTRUCTION SHEET I

THE PURCHASE REQUISITION AND THE PURCHASE ORDER

For retailers to be of service to their customers and to maintain a competitive edge, they must have a sufficient amount of merchandise on hand at all times. To do this, the retailer must make employees aware that they must order merchandise whenever the supply level reaches the minimum level that must be on hand to best serve the store's customers.

As salespeople and stock clerks are constantly knowledgeable of the level of merchandise in both the warehouse and on the sales floor, it is their responsibility to either notify their department manager of low supplies or to write orders for merchandise that has reached the minimum level.

The requisition and purchase order of each retailer will have a different format; however, each of these forms will have spaces for the same information. When you have learned how to fill out each of these forms, you will be of greater service to your retail employer. The purchase requisition form (see on the following page) is simply a form that is completed to tell another store employee, usually the buyer, that a department needs to order or reorder specific items of merchandise. It must be filled out completely and accurately if the buyer is to purchase the needed items.

The Purchase Requisition

When you are filling out a purchase requisition form, follow the steps listed below:

1. Write the name or code number of your department.

2. Write the date that the items are needed.

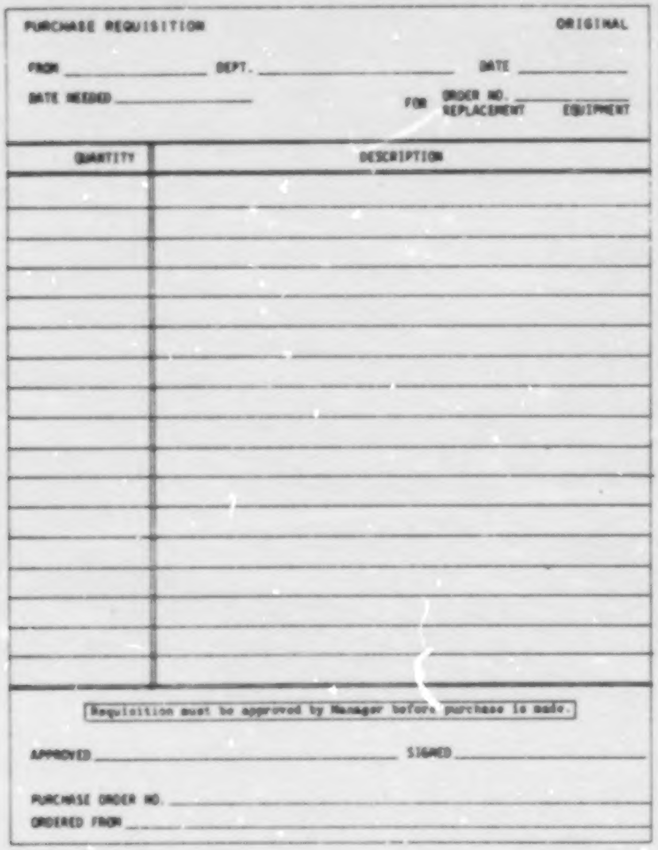
3. Write the date of the day that you are filling out the requisition.

4. Write the number of the purchase request. This number is usually one that follows the one given to the last requisition made by your department. For example if the last one was 400, this one would be 401.

5. Write the number of the items being requested.

6. Write the name of the item that you are requesting and include the stock number.

INSTRUCTION SHEET I, (page 2)



PURCHASE REQUISITION ORIGINAL

FROM ______ DEPT. ______ DATE ______

DATE NEEDED ______ FOR ORDER NO. ______ REPLACEMENT EQUIPMENT

QUANTITY	DESCRIPTION

Requisition must be approved by Manager before purchase is made.

APPROVED ______ SIGNED ______

PURCHASE ORDER NO. ______

ORDERED FROM ______

7. This space is for the buyer to approve or disapprove the purchase requisition. The buyer will write either approved or disapproved.

8. This space is for the signature of the person approving or disapproving the purchase requisition.

9. This space is for entering the number of the purchase order.

10. This space is for entering the name of the vendor (supplier).

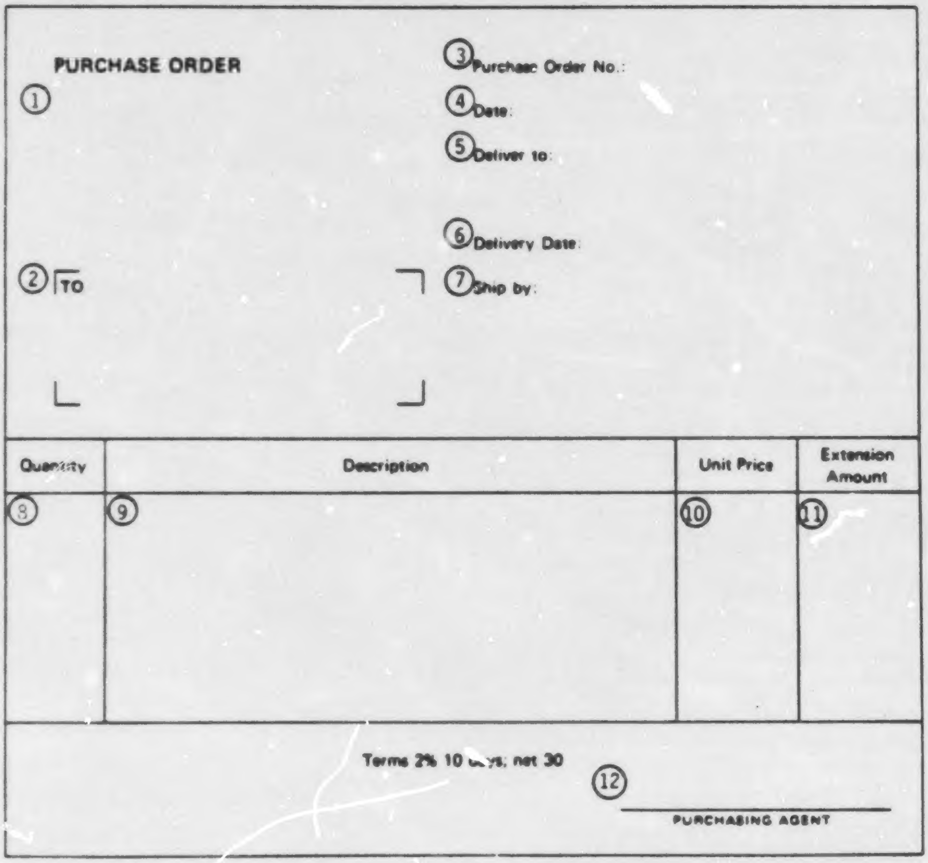
INSTRUCTION SHEET I, (page 3)

The Purchase Order

After the purchase request is approved, a purchase order is filled out. Salespeople and stock clerks may be asked to do this. Each retail establishment will have their own form: however, each form will have spaces for filling in the same information. The purchase order form on the following page is an example of one that retailers use when ordering merchandise.

1. Address of the retailer making the purchase.
2. Address of the vendor.
3. Number retailer assigns to each purchase order for inventory and accounting purposes.
4. Date purchase order is filled out by retailer.
5. Location where merchandise is to be delivered by carrier.
6. Date that retailer is requesting delivery of merchandise from vendor.
7. Method of delivery retailer is requesting.
8. The number of each item retailer is requesting.
9. Name and stock number of the merchandise being ordered.
10. The cost for one of the items of merchandise.
11. The cost of one of the items of merchandise multiplied by the total number being requested.
12. Signature of person authorized to order merchandise.

INSTRUCTION SHEET I, (page 4)



PURCHASE ORDER

①

③Purchase Order No.:

④Date:

⑤Deliver to:

⑥Delivery Date:

② TO

⑦Ship by:

Quantity	Description	Unit Price	Extension Amount
⑧	⑨	⑩	⑪

Terms 2% 10 days; net 30

⑫

PURCHASING AGENT

It is important that you fill out purchase orders COMPLETELY and ACCURATELY because this document is the one that brings the "life-blood" of the business--merchandise--to the retailer.

STUDENT SELF-CHECK II

WRITING PURCHASE ORDERS

Directions: Obtain a copy of the purchase order form from your instructor. Use the information contained on the department requisition below to complete the purchase order. When you have finished, check your answers according to the procedures established by your instructor.

Order Number 12345
Unit Price for hammers - $6.50
Unit Price for screwdrivers - $3.45
Unit Price for crescent wrench - $3.19
The order is to be placed with:
ABC Hardware Supply
100 First Avenue,
Anytown, Kentucky 00000
The merchandise is to be shipped by UPS.
You are the purchasing agent.
Use the present date
Your company name and address is:
    X-Company
    111 Anytown Road
    Anytown, Kentucky 00000.

INSTRUCTOR'S FINAL CHECKLIST

ORDERING MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of filling out the purchase order, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Legibly entered all data..................	[ ]	[ ]	[ ]	[ ]
b. Entered the following information:				
(1) Date of the purchase order...........	[ ]	[ ]	[ ]	[ ]
(2) Requested shipping date..............	[ ]	[ ]	[ ]	[ ]
(3) Requesting department number.........	[ ]	[ ]	[ ]	[ ]
(4) Method of shipping..................	[ ]	[ ]	[ ]	[ ]
(5) Who is to pay for shipping charges...	[ ]	[ ]	[ ]	[ ]
(6) Name and address of the vendor.......	[ ]	[ ]	[ ]	[ ]
(7) Suppliers' house number..............	[ ]	[ ]	[ ]	[ ]
(8) Terms...............................	[ ]	[ ]	[ ]	[ ]
(9) Catalog ordering number..............	[ ]	[ ]	[ ]	[ ]
(10) Descriptions of items................	[ ]	[ ]	[ ]	[ ]
(11) Sizes................................	[ ]	[ ]	[ ]	[ ]
(12) Number (quantity) requested..........	[ ]	[ ]	[ ]	[ ]
(13) Unit cost............................	[ ]	[ ]	[ ]	[ ]
(14) Total cost of each style.............	[ ]	[ ]	[ ]	[ ]
(15) Total cost of the order..............	[ ]	[ ]	[ ]	[ ]
(16) Signature (student's)................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statement below explains the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, ORDERING MERCHANDISE.

Your instructor will provide a department requisition for merchandise, a supplier's catalog, and a purchase order form. Prepare the purchase order.

RETAILING

TELEPHONING ORDERS TO WHOLESALERS

INTRODUCTION

One of the major suppliers of merchandise for retail establishments is the wholesaler. The wholesaler provides many services, such as offering smaller quantities of items of merchandise than could be purchased directly from the manufacturer. The retailer often must order merchandise from the wholesaler. In this module, you will learn how to call an order of merchandise to the wholesaler.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a store order for merchandise and access to a telephone, call the wholesaler and place the order. All applicable criteria on the Instructor's Final Checklist should be acceptably completed.

Kentucky Department of Education

1982-83

VOCABULARY

Telephone etiquette - an acceptable procedure for placing business and social telephone calls.

Teletrainer - a telephone training device.

Wholesaler - a business that buys large amounts of merchandise form manufacturers, stores the merchandise and sells it to retailers in amounts that the retailers request.

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, THE WHOLESALER.

   (or) ______________________________

2. READ Instruction Sheet II, TELEPHONING AN ORDER TO THE WHOLESALER.

   (or) ______________________________

3. LISTEN to your instructor discuss how to use the telephone in business.

4. PRACTICE placing orders for merchandise in your learning lab by completing Student Self-Check I, CALLING ORDERS TO WHOLESALERS.

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

INSTRUCTION SHEET I

THE WHOLESALER

Wholesalers play a very important role in the distribution of merchandise. Their primary function is to buy merchandise in large quantities and sell it in smaller quantities to retailers, other businesses, and industrial users. For the wholesalers to have information concerning the needs of the retail establishment they serve, many of them set up telephone ordering systems.

As an employee of a retail establishment, you may be requested to telephone order merchandise from a wholesaler. It is important to always remember that if a retail establishment is to properly serve its customers it must have a sufficient supply of merchandise on hand. The wholesaler is always ready to help the retailer meet this objective. To perform this service for the retail establishments, many wholesalers have a staff of salespeople who take telephoned orders each business day.

When you call orders for merchandise to the wholesaler, practice these general guidelines:

1. Before calling, write your order and place it before you.
2. Speak clearly and distinctly with the wholesale salesperson taking your order.
3. If the wholesale salesperson does not repeat your order, ask her/him to do so. Check the read-back with your written order.
4. Know and practice the procedures used by your retailer when telephone ordering merchandise.

INSTRUCTION SHEET II

TELEPHONING AN ORDER TO THE WHOLESALER

The following guidelines will help you learn how to telephone orders to the wholesaler:

1. Read the order you are going to call before placing your call. Check it to determine whether you understand the name, description, and quantity of each item to be ordered.

2. Place the call to the wholesaler.

3. Identify yourself to the wholesaler by:

   a. Telling the order clerk the name of your retailing establishment.
   b. Telling the order clerk your name so that if any questions arise concerning the order the wholesaler will be able to call you.

4. Place your order with the order clerk being sure to state:

   *a. The name or description of each item.
   b. The size of each item (if applicable).
   c. The quantity (number) needed.

5. If the order clerk does not reread your order, ask that this be done so that you can verify your order.

6. Write a notation beside any item that is not available.

7. Write a notation on the order if substitutions are to be made.

8. Tell the order clerk if the order is to be picked up or delivered.

9. End your call with an appropriate close.

10. After completing your call, write on the order form the date the order was called and the name of the wholesaler. Give it to the designated store employee.

*Be prepared to make decisions concerning substitutions of merchandise, should the wholesaler not have a specific item in stock.

STUDENT SELF-CHECK I

CALLING ORDERS TO WHOLESALERS

Practice Exercise: Assume you work for a retail establishment and are asked to telephone the order below to the wholesaler. Obtain the telephone training instrument from your instructor, ask a fellow student to play the role of the wholesale order clerk, and telephone the orders.

Order For Merchandise

2 Item No. 1313 Blue Jeans Size 28
3 Item No. 1313 Blue Jeans Size 30
4 Item No. 1313 Blue Jeans Size 32
4 Item No. 1313 Blue Jeans Size 34
3 Item No. 1313 Blue Jeans Size 36
2 Item No. 1313 Blue Jeans Size 38

The order is to be delivered.

As you conduct the call, have your fellow student use the checklist on the following page to insure that you follow the correct procedures.

You work for: X-Company
111 1st Street
Anytown, Kentucky 00000

STUDENT SELF-CHECK, (page 2)

Yes	No		Checklist
____	____	1.	Read the order before placing the call.
____	____	2.	Identified self and name of business to the wholesaler's order clerk.
____	____	3.	Correctly read the order to the order clerk
____	____	4.	Asked the order clerk to verify the complete order.
____	____	5.	Noted each item that was not available.
____	____	6.	Requested substitutes for unavailable items, (if desirable)
____	____	7.	Specified if the order was to be picked up or delivered.
____	____	8.	Requested and noted a delivery date for the order.

INSTRUCTOR'S FINAL CHECKLIST

TELEPHONING ORDERS TO WHOLESALERS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When calling a wholesaler and placing an order, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Identified self and name of business to the wholesaler's order clerk	[ ]	[ ]	[ ]	[ ]
b. Placed the order by giving the order clerk the name of each item and the quantity needed	[ ]	[ ]	[ ]	[ ]
c. Asked the order clerk to verify the complete order	[ ]	[ ]	[ ]	[ ]
d. Noted each item that was not available	[ ]	[ ]	[ ]	[ ]
e. Requested substitutes for unavailable items	[ ]	[ ]	[ ]	[ ]
f. Specified if the order was to be picked up or delivered	[ ]	[ ]	[ ]	[ ]
g. Requested and noted a delivery date for the order	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you have gone through the activity, your instructor will rate your performance using the Instructor's Final Checklist, TELEPHONING ORDERS TO WHOLESALERS.

Your instructor will give you an order for merchandise that is to be telephoned to a wholesaler. Order the merchandise.

RETAILING

PROCESSING CUSTOMERS' SPECIAL ORDERS

INTRODUCTION

As a service to their customers, many retail establishments accept special orders for merchandise. Special orders for merchandise may result because the customer's specific size, style, or color is not in stock. Special orders may be made because the customer requests an item of merchandise that is new and is not in stock. Also a special order may result because the merchandise has been sold out. Whatever the reason for a special order, you, as an employee of a retail establishment, need to know how to process customers' special orders for merchandise. In this module you will learn how to process customers' special orders.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a customer who wishes to make a special order and a special order form, process the customer's special order. All required information must be included on the order form.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, PROCESSING CUSTOMERS' SPECIAL ORDERS.

   (or) ____

2. LISTEN to your instructor discuss "Processing Customers' Special Orders."

3. PRACTICE writing a customer's special order. ASK your instructor for a practice case problem.

4. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

PROCESSING CUSTOMER'S SPECIAL ORDERS

Retail establishments are in business because they serve the needs of their customers. However, there are times when specific needs of a customer cannot be fulfilled. This may result because the store does not have a specific size, color, style, or kind in stock. It may result because the customer's request is for an item that is new and has not been purchased by the store. Or it may result because the store has sold all of its stock of the requested item. Whatever the cause, many retailers do make an effort to serve the customers who have special needs by special ordering the merchandise requested.

If this is the policy of your retailer, you should be able to process customers' special orders. Although the process for taking special orders may differ from store to store, the following guidelines are generally used:

1. If the customers cannot find the specific item, style, color, size, or model they need, you may suggest a similiar one. However, do not insist that they accept your suggestion. You may lose the sale. Remember, only make the suggestion. When your suggestion is not accepted and you know that you can order the item, simply say, "I am sorry that we do not have the specific item that you need, but I can special order it for you and I will have it for you in ____ days." If you are not certain about ordering the item, ask your department manager. Do not say that you can special order if you are not certain. Be certain!
2. If the customer accepts your special order offer, obtain the special order form used by the store and complete it. It is important that you write all of the requested information. Remember, others cannot read your mind. You will find that the special order forms will ask for the following information:
    a. Name, address, and phone number of the customer.
    b. A description of the item or items requested by the customer.
    c. Quantity requested.
    d. Size, style, color, model requested.
    e. Stock number of the item or items.
    f. Unit cost of the item.
    g. Total cost of the items.
    h. Applicable tax.
    i. Department making request.
    j. Salesperson making request.
    k. Customer's signature.
    l. Amount of down payment made by the customer (optional).
    m. Estimated date that item or items will arrive.
3. If your store requires that the customers make a payment on the special ordered item(s), write the amount received and ring this amount on the cash register.

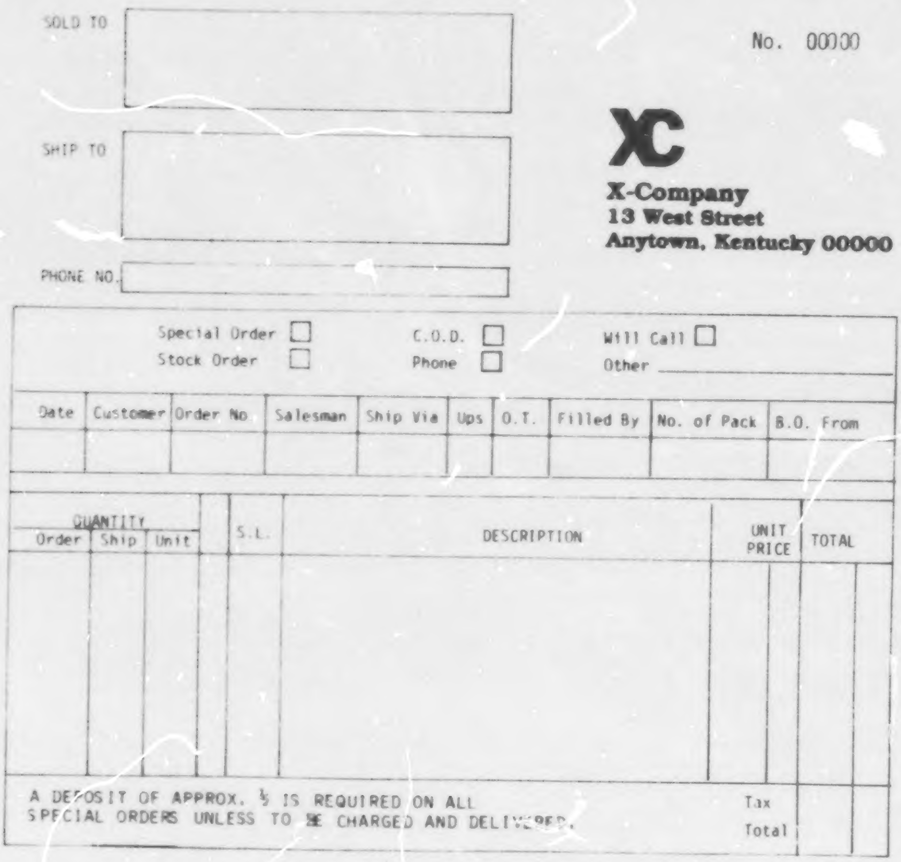
INSTRUCTION SHEET I, (page 2)

4. Read the information from the special order form to the customer, asking him/her to verify it.

5. Tell the customer that you will notify him/her either by telephone or mail when the special order is available.

6. Send a copy of the special order form to your department manager/buyer.

7. Call or notify your customer by mail as soon as you receive the special order merchandise.



SOLD TO

SHIP TO

PHONE NO.

No. 00000

XC
X-Company
13 West Street
Anytown, Kentucky 00000

Special Order ☐
Stock Order ☐
C.O.D. ☐
Phone ☐
Will Call ☐
Other

Date	Customer	Order No	Salesman	Ship Via	Ups	O.T.	Filled By	No. of Pack	B.O. From

QUANTITY				S.L.	DESCRIPTION	UNIT PRICE	TOTAL
Order	Ship	Unit					

A DEPOSIT OF APPROX. ⅓ IS REQUIRED ON ALL SPECIAL ORDERS UNLESS TO BE CHARGED AND DELIVERED.

Tax

Total

INSTRUCTOR'S FINAL CHECKLIST

PROCESSING CUSTOMERS' SPECIAL ORDERS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When processing the customer's special order, the student:	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Wrote all applicable information on the special order form	[ ]	[ ]	[ ]	[ ]
b. Verified the information with the customer ..	[ ]	[ ]	[ ]	[ ]
c. Asked for and receipted partial payment for the special ordered merchandise	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statement below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PROCESSING CUSTOMERS' SPECIAL ORDERS.

Your instructor will provide a customer who desires to special order merchandise. Special order the merchandise.

Module R-8

RETAILING

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

INTRODUCTION

Working safely on the job is a must if accidents and injuries are to be avoided. You will be expected to safely perform each retailing task whether it be in the warehouse or retail sales area. In this module, you will learn many of the safety factors that you will have to practice as an employee of a retail establishment.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

(1) Given a variety of case problems, list the correct safety procedures to be performed in each situation. Each case problem must be solved with 90% accuracy.

(2) Provided a load of merchandise, safely lift, carry, and put down the load. All items on the Instructor's Final Checklist must be performed without error.

LEARNING ACTIVITIES

1. LISTEN as your instructor discusses "PRACTICING SAFETY IN RETAIL WAREHOUSES AND STORE."

   (or) ______________________________

2. READ Instruction Sheet I, IMPORTANCE OF SAFETY.

   (or) ______________________________

3. READ Instruction Sheet II, SAFETY AND MAINTENANCE PROCEDURES FOR USING RECEIVING EQUIPMENT.

   (or) ______________________________

4. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, SAFETY PROCEDURES FOR RECEIVING EQUIPMENT.

5. READ Instruction Sheet III, ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES.

   (or) ______________________________

6. CHECK YOUR KNOWLEDGE by completing Student Self-Check II, ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES.

7. READ Instruction Sheet IV, SAFELY LIFT, CARRY, AND PUT DOWN A LOAD

   (or) ______________________________

8. OBSERVE as your instructor demonstrates how to safely lift, carry and put down a load.

9. CHECK YOUR KNOWLEDGE by completing Student Self-Check III, SAFELY LIFT, CARRY, AND PUT DOWN A LOAD.

10. PRACTICE lifting, carrying, and putting down a load of merchandise.

11. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

IMPORTANCE OF SAFETY

The receiving of merchandise into a retail store and warehouse requires employees to handle large amounts of merchandise and freight. Employees must have a knowledge of safety measures or procedures, as there are some hazards involved in the receiving process.

Various mechanical equipment is often used to reduce hazards as well as to reduce handling time and manual labor. If equipment is provided, it should be used routinely and safely. Therefore, it is important for an employee to become acquainted with the tools and equipment that the retail store provides.

There will be times when containers, merchandise, and supplies must be manually carried and placed in other areas of the warehouse or retail store. To avoid personal injury there is a right way to lift, carry, and put down loads. This "right way" is important to learn as it will reduce personal injury, wear and tear on the body, and it will help prevent accidents from occuring.

INSTRUCTION SHEET II

SAFETY AND MAINTENANCE PROCEDURES FOR USING RECEIVING EQUIPMENT

It is important for an employee to be alert to the safety procedures and maintenance needs of the equipment he/she uses. Listed below are some safety and maintenance procedures to follow when using receiving equipment.

Marking machines should be taken care of by observing the following rules:

(1) Marking machines should be brushed daily.

(2) Ink pads should be cleaned and inked.

(3) Type used should be perfect.

(4) Marking machine should be turned off and covered when not in use.

(5) The store manager or department manager should be notified when the marking machine is not properly working.

(6) The tag knife should be inspected when the tags do not have clean, smooth edges.

When using a two-wheeled hand truck, the following safety rules should be observed:

(1) Place heavy objects at the bottom to keep the center of gravity of the load as low as possible.

(2) Place the load forward to make sure the weight is carried by the axle and not by the handles.

(3) Place the load so that it will not fall, slip, or shift.

(4) Load so that the view ahead is clear.

(5) Maintain the balance of the load, but let the truck carry the load.

(6) Do not walk backward.

(7) Keep the truck ahead of you when going down an incline.

(8) Keep the truck behind you when going up an incline.

(9) Do not run.

(10) Keep the truck constantly under control.

INSTRUCTION SHEET II, (page 2)

(11) Inspect the truck daily.

(12) Lubricate the truck once a week.

(13) Remove the truck from service if it has a defective axle or broken handle.

When using a four-wheeled hand truck, the following safety rules should be observed:

(1) Do not put your feet under the wheels and casters while loading.

(2) Keep the truck in front of you and push.

(3) Do not load a truck so high that you can't see where you are going.

(4) Put your fingers on the handle so that they will not be crushed if the truck bumps into something.

(5) Keep the handle in an upright position when not in use.

When using a wheelbarrow, the following safety rules should be observed:

(1) Do not run.

(2) Keep your back upright and lift with your legs to avoid back strain.

(3) Balance heavy loads and stay away from the handles in case the load tips.

(4) Protect your knuckles with leather, wood, or metal knuckle guards on the handles.

(5) Do not use wheelbarrows with cracked or broken handles, damaged wheels, loose legs, or ragged edges.

(6) Check wheeling planks to make sure the planks are well supported to prevent load shifts.

When using a hand truck, the following safety rules should be followed:

(1) Do not allow riders.

(2) Load materials so that they will not slide or roll off.

(3) Ask for help when the load is too heavy or when the truck is too large.

INSTRUCTION SHEET II, (page 3)

(4) Do not race an empty truck of any kind.

(5) Be sure to wear safety shoes.

(6) Place trucks so that they are clear of passageways when they are not in use.

STUDENT SELF-CHECK I

SAFETY PROCEDURES FOR RECEIVING EQUIPMENT

Directions: Number your paper from 1 to 10. Read each statement, if it is true write a "T"; if the statement is false, write an "F". When you have finished, check your answers according to the procedures established by your instructor.

1. There are not any hazards involved in the receiving process.
2. Employees should use the proper equipment in the receiving process.
3. Employees should protect their knuckles when using a four-wheeled ahdn truck.
4. You should not cover a marking machine when it is not in use.
5. When using a two-wheeled hand truck, you should place heavy materials on top.
6. You should place a load on a two-wheeled hand truck so that the load does not block your view.
7. When using a four-wheeled hand truck, you should keep the truck in front of you and push.
8. When using a wheelbarrow, you should keep your back in an upright position and lift with your legs.
9. When using a hand truck, you should give your friend a ride on the truck.
10. If a load is too heavy, you should ask for help.

INSTRUCTION SHEET III

ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES

In order to prevent accidents and insure the efficient performance of equipment, an employee should follow the following procedures:

Bailing or Trash Room

(1) Packing materials, such as straw and excelsior, should be removed immediately or put in a metal can with a tight cover.
(2) Floors should be clean.
(3) Cartons should be flattened.
(4) Metal should be separated from burnable materials.
(5) Doorways should be unobstructed.

Carton Openers

(1) Carton openers should be used only for opening cartons.
(2) Do not use any other objects except carton openers to open cartons.

Ceiling and Walls

(1) Check ceiling and walls for holes.
(2) Make sure there is no broken or cracked plaster, tile, or vitriolite.
(3) Make sure there is no peeling paint.
(4) Make sure there are no broken windows.

Chairs and Tables

(1) Check chairs and tables for broken areas or sharp edges.
(2) Make sure chairs and tables are free of splinters and gum.
(3) Make sure there are no holes in the seats of chairs.
(4) Make sure there are no broken springs.

Counter Displays

(1) Check shelves and racks to make sure they are in good condition, adequately braced, sufficiently wide, and lipped to hold merchandise.
(2) Make sure display materials are secure and are removed to the fixture room when not in use.

Counter Glass

(1) Check counter glass and mirrors for raw edges and cracks.
(2) Make sure surplus glass is not stored on floors or behind counter or aisles.

INSTRUCTION SHEET III, (page 2)

Counters and Understock Doors

(1) Make sure there are not any splinters, sharp corners, or protruding nails.
(2) Make sure handles are secure on all doors and drawers.
(3) Make sure resting seats are secure.
(4) Make sure no fixtures are stored in understock.

Electrical Equipment

(1) Check electrical equipment for damage.
(2) Notify your supervisor if you find damaged or worn equipment
(3) Never repair electrical equipment yourself.

Electrical Panel Boxes

(1) Make sure electrical panel boxes are readily accessible.
(2) Make sure doors are closed and latched.
(3) Make sure covers are fastened securely.
(4) Make sure there is no excessive heat.

Elevators

(1) Make sure all doors, including hoistway, are closed when operating elevator.
(2) Make sure the emergency key is in the glass case at bottom.
(3) Make sure the elevator pit is free of refuse.

Entrance and Exit Doors

(1) Check doors to make sure they are in good operating condition.
(2) Make sure there are no missing, loose, or broken flush bolts, door stops, kick plates, or hardware.
(3) Check opening and shutting speed on door for flapping.
(4) Make sure doors close completely.
(5) Make sure threshold plates are secure, not slippery.
(6) Make sure aisles and corridors are not blocked.

Fire Corridors

(1) Make sure fire corridors are unobstructed.
(2) Make sure fire corridors are clean and well lighted.

Fire Extinguishers

(1) Make sure all extinguishers are clean and in good condition, including hose and nozzle. Check to see if there are missing parts.
(2) Make sure metal plates are secure.

(3) Make sure fire extinguishers are full, hung securely, conspicuously located, and readily accessible.
(4) Make sure fire extinguishers are tagged with last recharging date.
(5) Learn to properly use fire extinguishers.

Fixture Room and Storage Area

(1) Make sure fixtures are orderly and glass is sized within bins.
(2) Make sure floors are clean.

Floors and Aisles

(1) Remember to keep aisles clear.
(2) Make sure there are not any protruding objects.
(3) Check for holes in flooring.
(4) Make sure drains are free so that no backflow will occur.
(5) Make sure aisles are not blocked by stock, boxes, tools, or merchandise, or material-handling equipment.

Freight Receiving Area

(1) Make sure stairways, ladders, and chutes are in good condition.
(2) Check for broken steps, rungs, etc.
(3) Make sure gates protecting openings are closed when chute is not used.

Heating and Air Conditioning

(1) Check boiler, fan, air conditioning, motor, meter, and main electric switch to make sure they are clean and free of combustibles.
(2) Make sure rooms are not used for storage.
(3) Make sure combustibles are a safe distance from the heating or cooling areas.
(4) Check for missing switch or terminal boxes, plates, or covers.

Ladders and Stools

(1) Make sure ladders and stools are secure and adequately braced.
(2) Check for broken steps, rungs, or platforms.
(3) Make sure proper devices are provided and used for climbing.
(4) Make sure ladders and tools are stored in a designated place when not in use.

Outside Areas and Roof

(1) Make sure alley, window wells, drive, yard, and roof are in good condition and free from rubbish, weeds, etc.

(2) Make sure mouldings, signs, and walls are secure and unbroken.
(3) Check to see if refuse is in covered metal containers.

Personnel Facilities

(1) Check coat locker, and restroom areas and laboratories to make sure they are properly equipped, clean, and maintained on schedule.
(2) Make sure there is not any damaged or broken furniture and fixtures.
(3) Check security of fixtures.
(4) Check plumbing to make sure it is in good working order and has no broken or loose parts.
(5) Check for proper lighting and make sure burned out bulbs are replaced.

Shopping Carts

(1) Make sure shopping carts are clean and in good condition.
(2) Make sure accident prevention signs are properly posted on all carts.

Sidewalks, Entrances, and Awnings

(1) Check sidewalks and entrances to make sure they are free from tripping hazards.
(2) Make sure the flow of traffic is unobstructed.
(3) Check doors to make sure they are in good condition and level with walks.
(4) Make sure awnings are in good condition and secure.
(5) Make sure show windows and framing are secure.

Sprinkler System

(1) Make sure the pipe is secured to the ceiling and free of hanging or stored objects.
(2) Make sure the shut-off valves are sealed, open, labeled, and readily accessible.

Stairways

(1) Make sure stairs are treaded and in good condition.
(2) Check handrails to make sure they are in good condition and secure.
(3) Check stairways for free-flowing traffic with no obstructions.
(4) Make sure signs reading "Caution--Please Use Handrail" are posted as instructed.

Stock Room

(1) Never reach higher than eye level.
(2) Never lift objects heavier than safety permits.

(3) Make sure shelves are secure.
(4) Make sure there is no top-heavy merchandise.
(5) Make sure no objects are protruding from the bins.

Trucks, Carts, and Baskets

(1) Make sure they are not broken.
(2) Make sure they are clean.
(3) Make sure trucks, carts, and baskets are free from splinters and protruding edges or nails.
(4) Make sure there are no loose or missing bolts and wheels.

Vending Machines

(1) Make sure machines are level with the floor.
(2) Make sure traffic is not obstructed.
(3) Make sure machines and areas around and underneath are clean.
(4) Make sure coin-operated devices are properly grounded.
(5) Make sure machines are in working order.

STUDENT SELF-CHECK II

ACCIDENT PREVENTION AND CARE OF STORE EQUIPMENT AND FACILITIES

Directions: Number your paper from 1 to 25. Read each statement, if it is true, write a "T", if it is false, write an "F." When you have finished, check your answers according to the procedures established by your instructor.

1. In the bailing or trash room, metal should be separated from burnable materials.
2. You should use any sharp object to open a carton.
3. You should check the ceiling and walls for peeling paint.
4. Chairs and tables should be checked for broken areas or sharp edges.
5. It is unnecessary to check display shelves and racks.
6. Counter glass should be stored on the floor or behind a counter.
7. You should check the counter and understock doors for loose handles.
8. You should repair electrical equipment.
9. You should check an electrical panel box for excessive heat.
10. Elevator pits should be free from refuse.
11. Entrance and exit doors should never be blocked.
12. A fire corridor should be clean and well lighted.
13. You should never hang a fire extinguisher in a conspicuous place.
14. In the fixture room, fixtures should be in an orderly arrangement.
15. Aisles on the selling floor should be free of stock, boxes, tools, or merchandise.
16. When a chute is not being used, the gates protecting the chute should be open.
17. The heating and air conditioning room should be used as a storage room.
18. When using a ladder or stool, you should always check the condition of the ladder or stool before you climb upon it.

STUDENT SELF-CHECK II, (page 2)

19. Refuse should be stored in metal containers.

20. Accident prevention signs should be posted on shopping carts.

21. Entrances to the store should be free from tripping hazards.

22. You should use the sprinkler system pipes for hanging objects.

23. In the stock room, you should never reach higher than eye level.

24. You should check carts and baskets for missing bolts and wheels.

25. Vending machines should be level with the floor.

INSTRUCTION SHEET IV

SAFELY LIFT, CARRY, AND PUT DOWN A LOAD

Procedures For Lifting A Load

Knowing the correct procedures for lifting a load will protect you from strain and injury. When lifting a load, use the following procedures:

(1) Consider the size, weight, and shape of the object.
(2) Give a corner of the object a trial lift.
(3) Get help if you have any doubts.
(4) Spread your feet 8 or 10 inches apart for a firm balance.
(5) To keep the back muscles from taking the whole load, place your feet close to the object you are going to lift.
(6) Straddle a corner of the load.
(7) Crouch down by bending your knees outward, but keeping your back straight.
(8) To keep your spine straight and firm, tuck in your chin so that your neck and head are in a straight line.
(9) Obtain a good grip on the load by holding the bottom corner nearest you and the top corner farthest away.
(10) Push up with your leg muscles, as they are your strongest muscles.
(11) Hold the load close to your body as you lift the load to a carrying position.

Procedures For Carrying A Load

Knowing the correct procedures for carrying a load will protect you from injuries. When carrying a load, use the following procedures.

(1) Check the load for size, loose parts, and parts sticking out.
(2) Check the route for obstacles, doors, stairs, and a place where the load may be set down so the carrier can rest.
(3) Lift the load.
(4) Carry the load close to your body.
(5) Do not run with a load.
(6) Do not jump off a loading dock or the last step on a stairway.
(7) Do not carry a load that cannot be seen over or around.
(8) Carry long objects over the shoulder with the front end of the object as high as possible.
(9) Tilt circular objects and roll on edge.

Procedures For Putting Down A Load

Knowing the correct procedures for putting down a load will protect you from hurting your back or hands. When putting down a load, use the following procedures:

INSTRUCTION SHEET IV, (page 2)

(1) Hold the load close to your body.
(2) Bend your kneeds outward, but keep your back straight.
(3) Lower the load by using your leg muscles.
(4) Set down one corner away from your fingers.
(5) Lower the rest of the load while you pull your hands from the corners.
(6) Push objects on tables or shelves with your arms or body.

STUDENT SELF-CHECK III

SAFELY LIFT, CARRY, AND PUT DOWN A LOAD

Directions: On a separate sheet of paper, number the procedures listed below according to the way in which the procedures should be done. Check your answers according to the procedures established by your instructor.

Lifting a Load

1. Hold the load close to your body.
2. Consider the size, weight, and shape of the object.
3. Push up with your leg muscles.
4. Give a corner of the object a trial lift.
5. Obtain a good grip on the load.
6. Get help if you have any doubts.
7. Tuck in your chin so that your neck and head are in a straight line.
8. Spread your feet.
9. Crouch down, but keep your back straight.
10. Place feet close to the object.
11. Straddle a corner of the load.

Carrying a Load

1. Carry the load close to your body.
2. Lift the load.
3. Check the route.
4. Check the load.

Putting Down a Load

1. Hold the load close to your body.
2. Lower the load by using your leg muscles.
3. Push objects on tables or shelves with your arms or body.
4. Bend your knees, but keep your back straight.
5. Lower the rest of the load while you pull your hands from the corners.
6. Set down one corner away from your fingers.

INSTRUCTOR'S FINAL CHECKLIST

PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) The student completed the following case problems with 90% accuracy:				
a. In Case Problem 1, the student listed ten equipment safety rules	[ ]	[ ]	[ ]	[ ]
b. In Case Problem 2, the student listed eight acceptable fire prevention and safety rules	[ ]	[ ]	[ ]	[ ]
c. In Case Problem 3, the student listed twelve acceptable retail store safety rules	[ ]	[ ]	[ ]	[ ]
d. In Case Problem 4, the student listed fifteen acceptable safety procedures followed in the receiving area	[ ]	[ ]	[ ]	[ ]
e. In Case Problem 5, the student listed ten acceptable housekeeping activities ..	[ ]	[ ]	[ ]	[ ]
f. In Case Problem 6 the student listed eight acceptable safety rules to follow when operating equipment	[ ]	[ ]	[ ]	[ ]
2. When lifting a load, the student:				
a. Considered the size, weight, and shape of the object	[ ]	[ ]	[ ]	[ ]
b. Gave a corner of the object a trial lift	[ ]	[ ]	[ ]	[ ]
c. Spread feet	[ ]	[ ]	[ ]	[ ]
d. Placed feet close to the object	[ ]	[ ]	[ ]	[ ]
e. Straddled a corner of the load	[ ]	[ ]	[ ]	[ ]
f. Crouched down, but kept back straight ...	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
g. Tucked in chin	☐	☐	☐	☐
h. Obtained a good grip on the load	☐	☐	☐	☐
i. Pushed up with leg muscles	☐	☐	☐	☐
j. Held the load close to body	☐	☐	☐	☐
3. When carrying a load, the student:				
a. Checked the load	☐	☐	☐	☐
b. Checked the route	☐	☐	☐	☐
c. Carried the load close to body	☐	☐	☐	☐
4. When putting down a load, the student:				
a. Held the load close to body	☐	☐	☐	☐
b. Bent knees, but kept back straight	☐	☐	☐	☐
c. Let down the load by using leg muscles	☐	☐	☐	☐
d. Set down one corner of the load away from fingers	☐	☐	☐	☐
e. Let down the rest of the load while pulling hands from the corners	☐	☐	☐	☐

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, PRACTICING SAFETY IN THE RETAIL WAREHOUSE AND STORE.

(1) Your instructor will provide you with six case problems. List the correct safety procedures performed in each situation.

(2) Your instructor will provide you with a load of merchandise. Safely lift, carry, and put down the load.

RETAILING

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

INTRODUCTION

Retailers make all-out efforts to maintain safe shopping and working environments for their customers and employees. However, accidents can and do occur. As an employee of a retail establishment, you must know how to come to the aid of a customer or store associate when you observe or when you come on the scene of an accident. In this module, you will learn how to handle customer/employee accidents.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given two case problems involving customer or store employee accidents, write the procedures that you as a witnessing or first-on-the-scene employee, would follow in handling the accidents. Each written description should contain the applicable steps that are listed on the Instructor's Final Checklist.

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, SAFETY FIRST PREVENTS ACCIDENTS LATER.

   (or) ____________________

2. READ Instruction Sheet II, IF AN ACCIDENT OCCURS.

   (or) ____________________

3. LISTEN as a resource persons discusses, "What Employees Should do if There is a Customer Accident."

4. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, SAFETY FIRST BEFORE ACCIDENTS.

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

SAFETY FIRST PREVENTS ACCIDENTS LATER

Retailers make an all-out effort to maintain safe shopping and working environments for their customers and employees. As an employee of a retail establishment, you will be expected to help in maintaining these safe conditions. Your employer will have specific activities for you to perform in the accident prevention program. The following list details some of the activities that you will be doing as an active member of the accident prevention team in your store. Remember, as you read this list, "Safety First Prevents Accidents Later."

How to Prevent Customers and Store Associates From Falling

1. Keep the customer traffic aisles clear by removing packing, wrapping paper, shopping carts, and stocking and cleaning equipment.
    a. Do not construct displays in customer traffic aisles.
    b. Avoid stocking merchandise where it will be knocked down by normal customer traffic.
    c. Maintain sufficient space in aisles for normal customer traffic.
    d. Return warehouse equipment to designated storage area. Do not leave it in the aisles of the warehouse.
    e. Inspect aisles periodically to see that they are clear.
    f. Stack merchandise so that it will not easily fall if bumped.
2. Keep the warehouse and retail store floors clean.
    a. Sweep up paper, cigarette butts, and any other trash.
    b. Dry mop floors periodically to remove dust.
    c. Wash and wax floors before or after store hours.
3. Keep the warehouse and retail store floors dry.
    a. Mop up water that is tracked into store.
    b. Replace wet mats with dry ones.
    c. Mop up water that may accumulate around displays.
4. Immediately sweep up broken glass, using a brush and dust pan instead of your fingers. Clean up sticky or dusty products that were in glass containers.
5. Always use ladders for climbing. Do not use shelves or boxes.

How to Prevent Accidents Caused by Lifting

1. Always use equipment designed for the load when moving merchandise and supplies.
2. Move heavy merchandise for your customers, or have warehouse personnel move it. Use moving equipment.

INSTRUCTION SHEET I, (page 2)

3. Carefully inspect the item to be moved. If it is too heavy for one person, ask for help.

How to Prevent Fires

1. Always observe no smoking signs. If there are areas in your store where smoking is prohibited, politely ask customers to observe them.

2. Place trash in designated receptacles. Do not let trash accumulate. Periodically empty trash cans in your department into outside receptacles.

3. Put out matches and smoking material before disposing of them.

4. Know where fire extinguishers are located. Be able to use them.

5. Be able to call for emergency help if necessary:

   a. Doctors
   b. Fire department
   c. Security police

6. Know where emergency and all exits are located.

7. Do not block aisles, doors and exits.

How to Prevent Cuts

1. Open containers with tools designed for the purpose.

2. Place tools in designated storage areas.

3. Keep cutting tools sharp.

4. Always cut away from your body.

If you will follow these basic common sense rules of safety, you will help prevent accidents to your customers, your store associates, and yourself.

INSTRUCTION SHEET II

IF AN ACCIDENT OCCURS

You have learned that there are basic common sense rules of safety that can reduce the occurrences of accidents. However, there will be times when accidents occur in your store. Should you be a witness or should you be the first on-the-scene, you must know what to do:

1. Know and practice your store's procedures, as each retailer will have established his/her own policies concerning how to handle customer and employee accidents.

2. If there is an injury accident and your store has designated employees as first-aid (trained) attendants, call for their assistance immediately.

3. If your store does not have first-aid trained people, immediately call owner/manager.

4. If your store has telephone numbers specifically designated for emergency calls, know these and know where the telephones are located for making such calls.

5. Comfort the accident victim until help arrives.

STUDENT SELF-CHECK I

SAFETY FIRST BEFORE ACCIDENTS

Directions: You have learned that all employees in retail establishments must be able to help maintain safe working environments for customers and associates.

You learned also that there are basic safety tasks that must be done to keep customers and store associates from getting hurt. Assume that you are an employee of a department store in Anytown, Kentucky. Read each of the case problems below and reply to them on a separate sheet of paper. Discuss your answers with your instructor. Check your answers according to the procedure established by your instructor.

1. Your department manager asks you to write a list of safety rules to follow in preventing falls in the retail store and warehouse. It will be posted on the employees' bulletin board for all other employees to read. Write this list of safety rules.

2. You have been asked to help train a new employee concerning the ways of safely lifting heavy loads. Write a list of the safety factors that you will tell the new employee.

3. Describe the safety rules that you will follow to prevent cutting accidents.

4. If you see an accident occur in the store where you are working, what should you do?

INSTRUCTOR'S FINAL CHECKLIST

HANDLING EMPLOYEE/CUSTOMER ACCIDENTS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

The student's written description contained the following steps:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
Situation 1				
a. Follow store policy	[ ]	[ ]	[ ]	[ ]
b. Get medical attention immediately	[ ]	[ ]	[ ]	[ ]
c. Obtain eye-witness report	[ ]	[ ]	[ ]	[ ]
d. Fill out accident report	[ ]	[ ]	[ ]	[ ]
Situation 2				
a. Follow store policy	[ ]	[ ]	[ ]	[ ]
b. Summon aid immediately	[ ]	[ ]	[ ]	[ ]
c. Keep customer comfortable	[ ]	[ ]	[ ]	[ ]
d. Keep store traffic away from victim	[ ]	[ ]	[ ]	[ ]
e. Obtain eye witness report	[ ]	[ ]	[ ]	[ ]
f. Fill out accident report form if requested	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, HANDLING EMPLOYEE/CUSTOMER ACCIDENTS.

Your instructor will give you two case problems involving store accidents. Describe in writing how you would handle each case.

RETAILING

RECEIVING SHIPMENTS OF MERCHANDISE

INTRODUCTION

As the name implies, the major task of the receiving clerk is to receive merchandise that is sent to retail establishment by vendors (suppliers). The receiving process includes many activities which you will learn about in this module.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activties in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided an incoming shipment of merchandise, unloading equipment, an invoice register, a shipping invoice (bill of lading), a purchase order, a discrepancy report form, and marking tools, receive the shipment of merchandise. The merchandise should be safely off-loaded without damage; each carton should be checked against the shipping invoice (bill of lading) and the purchase order; and each discrepancy should be noted. The shipment should be registered in the invoice register and the cartons should be marked with the store's receiving identification code.

Kentucky Department of Education

1982/83

LEARNING ACTIVITIES

1. READ about how to receive merchandise. Your instructor will provide a reference.

   (or) ______________________________

2. READ Instruction Sheet I, RECEIVING MERCHANDISE: A SUMMARY OF ACTIVITIES.

   (or) ______________________________

3. CHECK YOUR KNOWLEDGE of receiving shipments of merchandise by completing Student Self-Check I, RECEIVING SHIPMENTS OF MERCHANDISE.

4. LISTEN as your instructor discusses and demonstrates how to receive shipments of merchandise.

5. READ Instruction Sheet II, THE RECEIVING RECORD.

   (or) ______________________________

6. CHECK YOUR KNOWLEDGE of receiving merchandise by completing Student Self-Check II, THE RECEIVING RECORD.

7. READ Instruction Sheet III, RECORDING INVOICES IN THE INVOICE REGISTER.

   (or) ______________________________

8. CHECK YOUR KNOWLEDGE of recording invoices by taking Student Self-Check III, RECORDING INVOICES IN THE INVOICE REGISTER.

9. PRACTICE recording invoices in the invoice register by completing Instruction Sheet, REGISTERING THE INVOICE.

10. READ Instruction Sheet IV, CHECKING INVOICES WITH PURCHASE ORDERS.

    (or) ______________________________

11. CHECK YOUR KNOWLEDGE of checking invoices with purchase orders by taking Student Self-Check IV, CHECKING INVOICES WITH PURCHASE ORDERS.

12. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

RECEIVING MERCHANDISE: A SUMMARY OF ACTIVITIES

As a receiving clerk in a retail establishment your major job will be to receive shipments of merchandise which are sent to your store by many vendors (suppliers). There are many activities that you will be doing during the receiving process. The following is a list of the activities that you will be doing when receiving shipments of merchandise. You will:

1. Read shipping documents to determine that the merchandise has been delivered to the correct destination.
2. Decide what kinds of tools and equipment are needed for unloading the carrier.
3. Physically or mechanically unload the carrier (truck or box car).
4. Check each container for visible damage.
5. Mark each container with store identification code/number.
6. Check the number of containers with the shipping documents to determine that each container listed is received.
7. Record the shipment of merchandise on a receiving record.
8. Record any discrepancies including shortages, damages or overages on shipping documents, store forms, and invoices.
9. Sign shipping documents and in-store receiving documents as the store representative.
10. Have the truck driver sign shipping documents when discrepancies are found.
11. Maintain safety and security in the receiving area at all times.
12. Return tools and equipment used during the receiving process to the appropriate storage area.

STUDENT SELF-CHECK I

RECEIVING SHIPMENTS OF MERCHANDISE

Directions: You have read about how receiving clerks receive shipments of merchandise. On a separate sheet of paper, answer each of the following questions. Check your answers according to the procedure established by your instructor.

1. A platform where in-coming merchandise is off-loaded is called (a) a duck, (b) a dock, (c) a ramp. (Write the correct letter on your paper.)

2. A receiver does many activities when receiving in-coming shipments of merchandise. (Write the letter of the activities that the receiver performs on your paper.)

   a. The receiver checks the bill of lading for the following information: the name of the store that is to receive the shipment, the supplier's name, and the correct order of merchandise. (The bill of lading is checked against the purchase order.)

   b. The receiver fills out a receiving record, which is a report that the number of delivered cartons does or does not match the number of cartons stated on the bill of lading or the shipping invoice or the packing slip.

   c. The receiver lists damaged cartons on both the bill of lading and the receiving record.

   d. The receiver marks each carton with the store's receiving code.

   e. The receiver may check the weight of cartons.

   f. The receiver signs the bill of lading, keeps one copy, and gives one to the delivery person.

   g. The receiver sends the receiving records to the business office.

   h. The receiver sends the cartons to the checkers and the store's copy of the bill of lading to the traffic department or business office.

INSTRUCTION SHEET II

THE RECEIVING RECORD

As a receiving clerk or salesperson, one of the most responsible tasks to perform is reporting the amount of merchandise received. If you should report merchandise received that is not, in fact, received, this can cost your store money. If the store receives broken or damaged merchandise and you fail to detect and note it, this, too, will cost your store.

You are the store's representative when checking in merchandise. You must do this without error. When shipping errors are made, you must be alert in order to detect them. You must also check the general condition of the merchandise containers and note on the receiving forms any observed damage to the containers or merchandise.

As a receiving clerk or salesperson, you will be expected to perform the following activities when you are checking in merchandise:

1. Examine unopened containers for visible signs of damage.
2. Count and record each container of merchandise on the receiving record.
3. Record any errors in count of merchandise.
4. Record any observed physical damage to containers or merchandise.
5. Send a copy of the receiving records to the appropriate store employees, such as the buyer, the accounting department, and the checker/marker.

All of the above information must be recorded on a receiving form such as the one you see on p. . You will also observe that there is additional information on the receiving record, for it is the "official" document of each shipment received. The receiving record gives buyers and merchandise managers information concerning the status of ordered merchandise. Each store designs its receiving form as it best fits its operation. But the same basic information is usually on each. The receiving record has the following information:

1. Name and location of the shipper
2. Method of shipment
3. Shipping charges

INSTRUCTION SHEET II, (page 2)

4. Name of department to receive merchandise

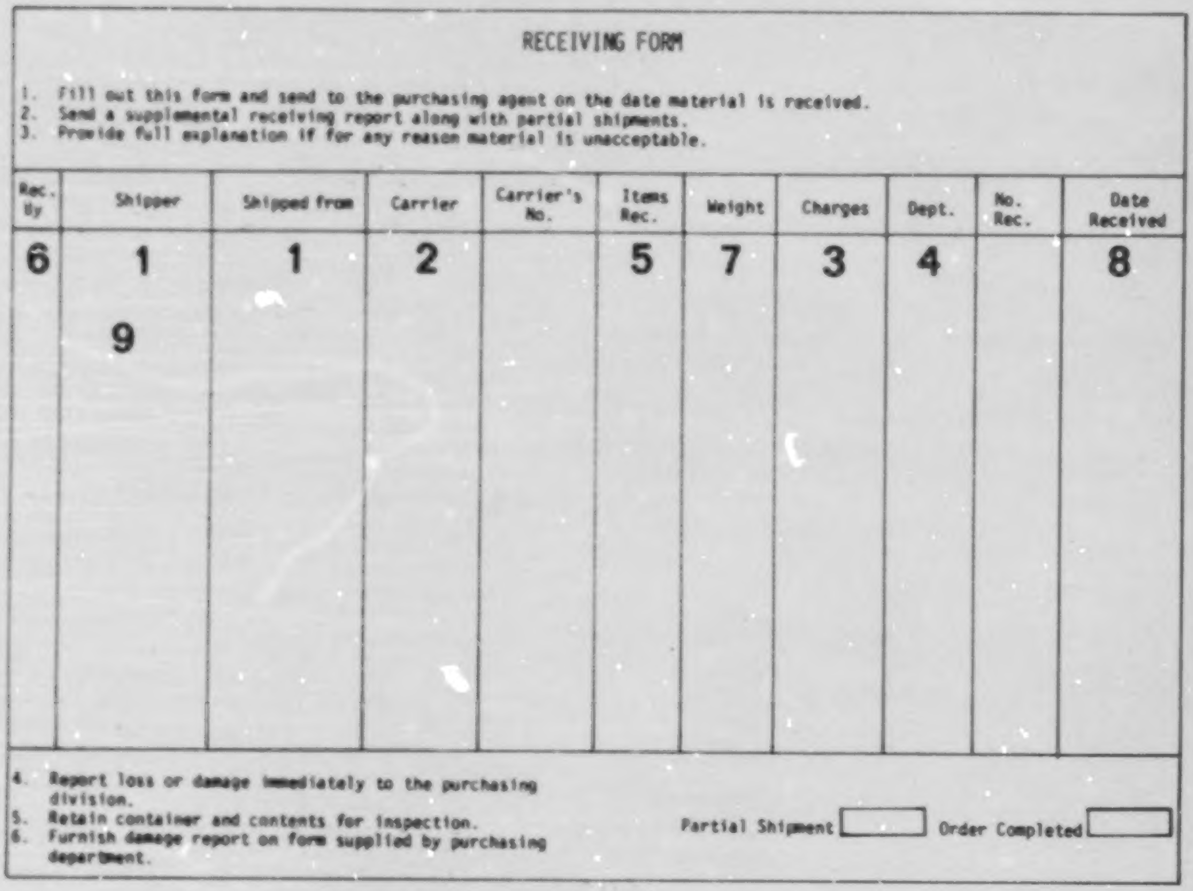
5. Amount received

6. Signature of the receiving clerk (initials)

7. Weight of the shipment

8. Date shipment is received

9. Notes concerning damaged or shortages of merchandise. (The store may have another form for reporting shipment errors. See the "Irregularities Form" on the following page.)



RECEIVING FORM

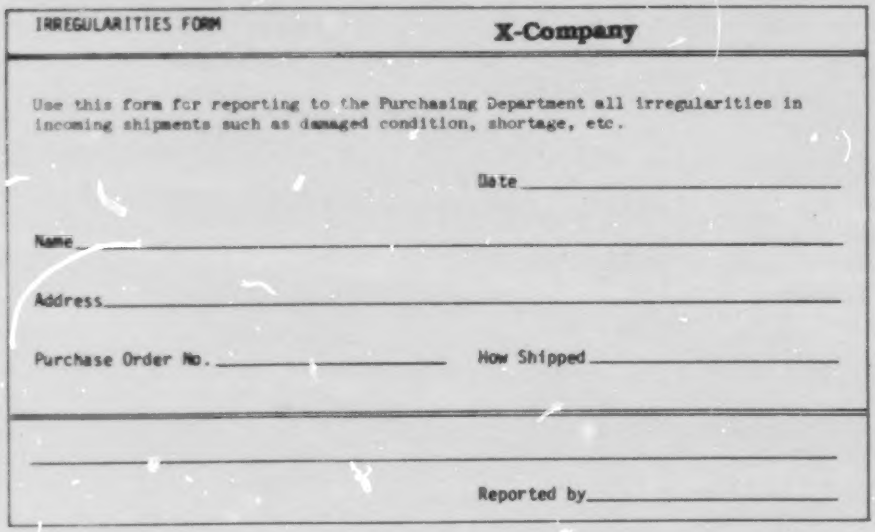
1. Fill out this form and send to the purchasing agent on the date material is received.
2. Send a supplemental receiving report along with partial shipments.
3. Provide full explanation if for any reason material is unacceptable.

Rec. By	Shipper	Shipped from	Carrier	Carrier's No.	Items Rec.	Weight	Charges	Dept.	No. Rec.	Date Received
6	1	1	2		5	7	3	4		8
	9									

4. Report loss or damage immediately to the purchasing division.
5. Retain container and contents for inspection.
6. Furnish damage report on form supplied by purchasing department.

Partial Shipment ☐ Order Completed ☐

INSTRUCTION SHEET II, (page 3)



IRREGULARITIES FORM

X-Company

Use this form for reporting to the Purchasing Department all irregularities in incoming shipments such as damaged condition, shortage, etc.

Date ______________________

Name ______________________

Address ______________________

Purchase Order No. ______________ How Shipped ______________

____

Reported by ______________________

STUDENT SELF-CHECK II

THE RECEIVING RECORD

Directions: You are the receiving clerk at Smith's Department Store in Anytown, Kentucky. An eighteen wheeler from Ace's Delivery has just pulled up to the unloading dock. The driver jumps down from the truck cab and hands you the shipping documents and says, "I have an order on the trailer for Smith's Department Store, can you unload me?" You immediately say "You bet. "I'll be right with you." You get two other helpers and begin to unload the trailer. You stack the order, keeping all boxes together in an area just inside the doors of the receiving warehouse, and reach for your clipboard with the attached receiving records. You start to check the merchandise and begin to write the following information on the receiving record.

--Thirteen pieces received
--Carrier: Ace's No. 4223
--Shipper: Rinks Cards, Inc
--Shipped from Kansas City, Missouri
--Weight: 220 pounds
--Freight charges: $40.00
--Merchandise goes to the Notions Department
--Today's date
--Purchase Order number: 149899

Use the above information to complete the following receiving record.

When you have finished, check your answers according to the procedure established by your instructor.

INSTRUCTION SHEET III

RECORDING INVOICES IN THE INVOICE REGISTER

The store where you work will have a system for recording when vendors' invoices are received. Whatever system is used it is important that the invoices be recorded, because the record will help check on delayed or misplaced invoices.

One system of recording received invoices used by some retail establishments is called the invoice register. The invoice register is a form that is used for recording the following data from an invoice:

--The vendor or supplier's name

--The invoice number

--The date of the invoice

--The total dollar amount of the shipment

--The department that receives the merchandise

--A column for keeping a record of payment

--The date the invoice was received by the retailer

If your store uses this method for registering invoices, you should follow these steps in completing the register:

1. Read the invoice and legibly enter the following data on the invoice register.
    a. Date invoice is received.
    b. Vendor's name.
    c. Number of the invoice.
    d. Date of the invoice.
    e. Total dollar amount of the invoice.
    f. Receiving department.
    g. Date paid is to be entered by the accounting department.
2. Send the invoice register to the designated store employee, because it serves as a permanent record of all received invoices.

STUDENT SELF-CHECK III

RECORDING INVOICES IN THE INVOICE REGISTER

Directions: On another sheet of paper, answer the following questions concerning recording invoices. Check your answers according to the procedures established by your instructor.

1. Write the letters of the two correct answers. Invoices from the vendors are registered by the retail establishment to aid the store employees in:

   a. locating a misplaced invoice.
   b. determining if an invoice has been received from the vendor.
   c. creating more paper work for employees.

2. Write the letters of the information that is recorded on the invoice register.

   a. Vendor's name.
   b. Number of the invoice.
   c. Date of the invoice.
   d. Date that the invoice is received.
   e. Total dollar amount of the invoice.
   f. Department that receives merchandise.

3. Write the letters of the correct answers.

Information entered on the invoice register should be:

a. Accurate.
b. Legible.
c. Entered immediately when the invoice is received.

INSTRUCTION SHEET IV

CHECKING INVOICES WITH PURCHASE ORDERS

A shipment of merchandise should be checked for damage, breakage, quantity received, agreement of prices, and terms of payment. Damage and breakage can be visually checked; however, the quantity received, the terms of payment, and the price when ordered versus the price when received must be checked against the original purchase order. Although suppliers/vendors make efforts to avoid invoice errors, mistakes such as clerical errors, substitutions, and shipping room miscues can and may occur.

When checking shipment invoices against purchase orders, the following should be validated:

> The quantity of each item, size, style, color, and model on the invoice should be the same as it appears on the purchase order. If discrepancies do exist, these should be immediately reported to the originator of the purchase order (department buyer, store manager). These discrepancies should also be noted on each document.
>
> If the terms of payment on the original purchase order do not agree with the terms of payment as stated on the invoice, this also should be noted on both documents and reported to the originator of the purchase order.
>
> If the vendor makes any substitutions, they should be documented on the purchase order and the invoice and the originator of the purchase order should be notified.
>
> If, discrepancies appear in the price when ordered and the price when received, they should also be documented on both forms and reported to the originator of the purchase order.
>
> Discrepancies between purchase orders and invoices can occur. If you are given the responsibility of comparing the two, do so carefully.

STUDENT SELF-CHECK IV

CHECKING INVOICES WITH PURCHASE ORDERS

Directions: The following example of an invoice and a purchase order has discrepancies. Find the discrepancies and note each on another sheet of paper. When you have finished, check your answers according to the procedures established by your instructor.

Example I

PURCHASE ORDER

X-Department Store
3995 Jackson Drive
Anytown, Kentucky 00000

Purchase Order No.: 14988

Date: 3-14-83

Deliver to:

Delivery Date: 3-28-83

Ship by: ACME Transfer

TO L. L. Lang Inc.
19 West Ninth
New York, New York
10001

Quantity	Description	Unit Price	Extension Amount
10	Watch, mens #4839, Digital	$75.00	$750.00
5	Necklaces, 14K gold #2382	$30.00	$150.00
12	Watch, ladies #3938 Digital	$65.00	$780.00
8	Bracelets, ladies, gold 14K, #98439	$35.00	$280.00
1	Watchband, display #14938, Bidel	$350.00	$350.00

$2310.00

Terms 2% 10 days; net 30

PURCHASING AGENT

STUDENT SELF-CHECK IV, (page 2)

SHIPPING INVOICE

L. L. Lang, Inc.
19 West Ninth Avenue
New York, New York 10001

Order Date 3-14-83	**Page** 1 **of** 1
Invoice Number	983 1480
Shipping Date	
Filled By	Joyce Johnson

Type of Sale	
☐ **Stock**	**Customer Order Number** 14988
☐ **Direct**	**Job Name**
☐ **Special**	**Ship Via** UPS
☐ **Tag & Hold**	**Ship to** X-Department Store
☐ **Transfer**	**Address** 3995 Jackson Avenue
	City Anytown · **State** Kentucky · **Zip Code** 00000

Order Number	**Quantity Ordered**	**Description**	**Quantity Shipped**	**Unit Price**		**Extension**	**Discount** 2 % 10 days	**Net**	
14988	10	Watch, Mens, 4839	10	95	00	950.00	Net 30	950	00
14988	5	Necklace, 14K, Gold #2382	5	30	00	150.00		150	00
14988	12	Watch, Ladies, #3938, Digital	12	65	00	780.00		780	00
14988	8	Bracelets, Gold 14K, #98439	8	35	00	280.00		280	00
14988	1	Display Watch Band, #14938		350	00	350.00		350	00
						Sub Total		2510	00
						Tax			
Received By:						**Total**		2510	00

INSTRUCTOR'S FINAL CHECKLIST

RECEIVING SHIPMENTS OF MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of receiving the shipment of merchandise, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
1. Examined the shipping documents to determine that the following information was correct:				
a. Name of the store	[ ]	[ ]	[ ]	[ ]
b. Supplier's name	[ ]	[ ]	[ ]	[ ]
2. Compared the shipping invoices and purchase order to determine that what was ordered was shipped	[ ]	[ ]	[ ]	[ ]
3. Filled out a receiving record accounting for each carton received	[ ]	[ ]	[ ]	[ ]
4. Noted each discrepancy on receiving documents	[ ]	[ ]	[ ]	[ ]
5. Marked each carton with store code	[ ]	[ ]	[ ]	[ ]
6. Signed the receiving documents and kept a copy	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, RECEIVING SHIPMENTS OF MERCHANDISE.

Your instructor will provide you with a shipment of merchandise, shipping documents, receiving forms, marking tools, and a purchase orders. Receive the shipment of merchandise.

RETAILING

OPENING CONTAINERS

INTRODUCTION

Merchandise and supplies arrive at the retailers in many different kinds of containers. These containers must be safely opened without damaging the contents. In this module you will learn how to safely open shipping containers without damaging the contents.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given opening tools and a variety of closed containers that are filled with merchandise, select the proper tools and open each of the containers. Each container must be opened with the proper tool without damaging any of the merchandise and without inflicting self-injury. The tools must be returned to storage and the trash must be cleaned up and thrown away.

LEARNING ACTIVITIES

1. READ about opening cartons. Your instructor will provide a reference.

   (or) ____________________

2. READ Instruction Sheet I, OPENING CONTAINERS.

   (or) ____________________

3. LISTEN as your instructor discusses and demonstrates how to safely open cartons without damaging merchandise.

4. READ Instruction Sheet II, SAFETY FIRST, ACCIDENTS NEVER.

   (or) ____________________

5. PRACTICE opening cartons in your learning laboratory.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

OPENING CONTAINERS

As a retail store employee you must be able to safely open numerous kinds of merchandise containers without damaging the contents. This may sound like an easy task, and it will be if you follow the appropriate safety procedures and if you select the appropriate tools for performing the activity.

To correctly open containers without damaging the contents you must be able to:

1. Select the appropriate tools.
2. Safely use each of these tools.
3. Open each container without damaging any of the merchandise.
4. Prepare the containers for reuse, or
5. Maintain a safe and clean opening area.

Selecting the Appropriate Tools

There are hand tools which are designed for opening containers. They should be used when they are available. They include the following:

Wire cutters:

--Used for cutting metal or plastic bands from container.

--Used for cutting wire from container.

Box cutter:

--Used for opening cardboard containers.

--Used for cutting tape.

Nail puller:

--Used for pulling nails from wooden boxes.

Pinch bars:

--Used for opening wooden boxes.

INSTRUCTION SHEET I, (page 2)

Band cutters:

--Used for cutting metal or plastic bands from cartons.

--Used for cutting wire from cartons.

Hammer:

--Used for sinking nails that stick up above the surface after wooden cartons have been opened.

INSTRUCTION SHEET II

SAFETY FIRST, ACCIDENTS NEVER

When you are opening boxes you must practice the following basic rules of safety to avoid injuring yourself or associates:

1. Do not start or get involved in horse play when opening boxes.
2. Use only tools that are designed for the task that you are doing.
3. If protective equipment such as safety glasses, gloves, and shoes are required, wear them.
4. When you are cutting boxes, always cut away from yourself. Adjust cutting blade to proper thickness of box to avoid cutting merchandise.
5. Use tools for opening the boxes. Metal bands, wires and corrugated paper and cardboard can cut hands. Be extremely cautious when cutting metal pressure applied bands on containers.
6. Replace tools in designated storage location when you have finished using them.
7. Pick up and dispose of trash (packing materials, boxes, bands, tape etc.).
8. Keep the area that is designated for opening boxes free of accumulated trash. Periodically dispose of empty boxes, packing material, metal bands, wire, nails, and tape.
9. Learn how to use each tool correctly.
10. Use each tool correctly.
11. Follow the procedures established by your store owner/manager.

INSTRUCTOR'S FINAL CHECKLIST

OPENING CONTAINERS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of opening cartons, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Observed acceptable safety rules..........	[ ]	[ ]	[ ]	[ ]
b. Selected appropriate tools for opening each carton..............................	[ ]	[ ]	[ ]	[ ]
c. Opened each container without damaging merchandise..............................	[ ]	[ ]	[ ]	[ ]
d. Appropriately salvaged each container.....	[ ]	[ ]	[ ]	[ ]
e. Returned tools to storage area............	[ ]	[ ]	[ ]	[ ]
f. Cleaned up opening area and appropriately disposed of waste materials...............	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, OPENING CONTAINERS.

Your instructor will provide a variety of closed cartons and opening tools. Open each of the cartons.

RETAILING

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

INTRODUCTION

After a shipment of merchandise has been received and checked in at the retailer's warehouse, or receiving area, the merchandise containers are opened. The items are checked with the invoice and purchase order to determine that each is what was ordered, that each is the quantity and quality ordered, and that each is void of damage. In this module, you will learn how to check in individual items of merchandise.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a shipment of merchandise, a copy of the purchase order, and a copy of the invoice, check in each item. All applicable items on the Instructor's Final Checklist should be completed.

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LEARNING ACTIVITIES

1. READ about checking in individual items of merchandise. Your instructor will provide a reference.

   (or) ________________________________

2. CHECK YOUR KNOWLEDGE of checking in individual items of merchandise by taking Student Self-Check I, CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE.

   (or) ________________________________

3. READ Instruction Sheet I, CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE.

   (or) ________________________________

4. OBSERVE as your instructor demonstrates how to check in individual items of merchandise.

   (or) ________________________________

5. PRACTICE checking in individual items of merchandise in the learning lab.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY on the back cover.

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STUDENT SELF-CHECK I

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

Directions: Read the following statements and on a separate sheet of paper place a check (✓) by the number of the ones that describe what you do when checking in individual items of merchandise. When you have finished, check your answers according to the procedures established by your instructor.

1. Compare the purchase order to the invoice or the packing slip to determine that what was ordered was shipped.
2. Open the cartons and count the merchandise using the stock numbers, colors, sizes, material, and patterns that are on the original purchase order. Note any discrepancy.
3. Remove, sort, and classify merchandise by stock number.
4. Inspect each item of merchandise to determine that it is in selling condition.
5. Check each item for possible damage and for quality.
6. Note each observed discrepancy on the store's report of shipment discrepancy form or on the invoice used for checking in the shipment.
7. Discuss shipment discrepancies with department manager or buyer.

INSTRUCTION SHEET I

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

Checking in individual items of merchandise is a task performed by either the receiving clerk, the stock person or in some large stores, the checker. This is usually the last time that an order of merchandise is checked, and for this reason it is a very important activity.

When merchandise is off-loaded at the warehouse, it is first checked according to number of packages received, name of item as indicated on the package, and stock number. This second check includes checking each item for quantity, quality, model, size, color, style, grade, freshness, and damage.

To check in individual items of merchandise you must:

1. Know and follow your store's check-in procedures which usually include activities similiar to the following ones.
2. Group all packages for one order according to the receiving number or identification code.
3. Locate the purchase order, invoice and/or packing list for the order.
4. Safely open the packages with appropriate tools, taking extreme care to avoid damaging the contents.
5. Check to determine that the items have been properly packed and packaged.
6. Remove the merchandise from the packages and sort according to their stock numbers on the invoice/purchase order. (Some stores sort also by the department which will receive the merchandise.)
7. Read the original purchase order and compare it to the invoice/packing slip to determine that what was ordered has been received. Note and/or discuss any discrepancies with the buyer or store manager/owner.
8. Inspect each item for the appropriate following factors:
    a. number received (quantity)
    b. quality
    c. model
    d. size(s)
    e. color
    f. style
    g. grade
    h. freshness
    i. damage

    (Some stores will request their buyers to check some of the above factors.)

INSTRUCTION SHEET I, (page 2)

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9. Write descriptions of any discrepancies on the invoice, the packing list, the purchase order, or on your store's discrepancy report form.

10. Write the actual number of each item received on the invoice/purchase order.

11. Sign or initial one or more of the following: invoice, purchase order, the packing list.

12. Route the merchandise to:

    a. Storage or
    b. Sales department or
    c. Marking section

13. Return the tools to the appropriate storage area.

14. Dispose of waste materials in the designated containers.

INSTRUCTOR'S FINAL CHECKLIST

CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When checking in the individual items of merchandise, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Grouped containers according to receiving number/identification code................	[ ]	[ ]	[ ]	[ ]
b. Gathered necessary documents..............	[ ]	[ ]	[ ]	[ ]
c. Located and opened container marked "Packing Slip Enclosed"...................	[ ]	[ ]	[ ]	[ ]
d. Safely opened containers..................	[ ]	[ ]	[ ]	[ ]
e. Checked containers for proper packing or packaging..............................	[ ]	[ ]	[ ]	[ ]
f. Removed merchandise.......................	[ ]	[ ]	[ ]	[ ]
g. Sorted merchandise by stock number........	[ ]	[ ]	[ ]	[ ]
h. Classified order..........................	[ ]	[ ]	[ ]	[ ]
i. Checked packing list/invoice against original purchase order...................	[ ]	[ ]	[ ]	[ ]
j. Checked merchandise for: quantity, quality, model, size, color, style, grade, freshness, and damage..............	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
k. Wrote the number of each item received on the invoice or purchase order..........	[ ]	[ ]	[ ]	[ ]
l. Noted any discrepancies..................	[ ]	[ ]	[ ]	[ ]
m. Signed or intitialed appropriate documents................................	[ ]	[ ]	[ ]	[ ]
n. Routed/moved merchandise and documents to marking department.....................	[ ]	[ ]	[ ]	[ ]
o. Disposed of waste........................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, CHECKING IN INDIVIDUAL ITEMS OF MERCHANDISE.

Your instructor will provide you an order of merchandise and receiving documents. Check in the individual items of merchandise.

RETAILING

PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS

INTRODUCTION

Your job as a receiving clerk in a retailer's warehouse or receiving area is one that has a great amount of responsibility. You will be responsible for determining that all shipments of merchandise are complete, that there is no visible damage to the shipment, and that the items received are exactly those that were ordered by the store. Usually shipments arrive at the receiving area in good condition and all items that have been ordered are received; however, there are times when shipping damage or errors occur. In this module, you will learn how to report these discrepancies by preparing an overage, shortage, and damage report.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a case problem that involves a shipment of merchandise that has discrepancies, complete an overage, shortage, and damage report. All items on the Instructor's Final Checklist should be performed acceptably.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ about how to file claims for damage of merchandise with carriers and vendors. Your instructor will provide you with a reference.

   (or) ______________________________

2. READ Instruction Sheet I, PREPARING OVERAGE, SHORTAGE, AND DAMAGE REPORTS.

3. LISTEN to your instructor discuss "Preparing an Overage, Shortage, or Damage Report."

4. CHECK YOUR KNOWLEDGE of preparing an overage, shortage, and damage report by taking Student Self-Check I, PREPARING AN OVERAGE, SHORTAGE, AND DAMAGE REPORT.

5. PRACTICE writing an overage, shortage, and damage report. ASK your instructor for practice sheets.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

PREPARING OVERAGE, SHORTAGE, AND DAMAGE REPORTS

When a retailer receives a shipment of merchandise that contains damaged items which cannot be sold, the retailer does not want to pay for them. The same is true when the retailer does not receive the number of items that appear on the invoice or bill of lading. What he/she does not have cannot be sold. Therefore, the first step is to notify the store management when damaged or short shipments are received. Also, merchandise may not meet the store's specifications even after it has been checked by checkers and markers. When and if the buyer or your store manager authorizes a return of merchandise for any reason, you must follow your store's practices.

As a receiving clerk, you will be the first one to see and check merchandise shipments. You will be the first one to know if any of the merchandise is missing as indicated by the numbers on the shipping documents. You will also be the first to see damaged cartons or damaged merchandise. If you suspect that either the shortage or the damage is a result of the shipping process, then a claim must be filed with the carrier.

What must you do to file this claim?

1. Write a note stating the shortage or damage on the shipping documents. Ask the driver to look at the damage or to count the cartons to see that there is an existing error.

2. Record the problem on your store's receiving record.

3. Record the problem on the invoice.

4. Report the problem to your supervisor or manager.

5. Notify the local agent of the carrier.

6. Ask the local agent to inspect the shipment.

7. Collect and prepare copies of all necessary papers for filing the claim with the carrier or vendor.

    a. Freight bill
    b. Bill of lading or shipping invoice
    c. Store's shipping discrepancy report form
    d. Invoice
    e. Repair bills, if damage has been repaired
    f. Carrier's agent inspection report
    g. List of items included in the claim
    h. Copies of correspondence concerning the claim

After your manager or your supervisor authorizes you to file the claim with the carrier or vendor, complete a overage, shortage and damage report form.

STUDENT SELF-CHECK I

PREPARING AN OVERAGE, SHORTAGE, AND DAMAGE REPORT

Directions: You have learned that the carrier is usually responsible for loss or damage to merchandise when it is en route to its destination. You have also learned that it will be your responsibility to check shipments of merchandise for visible damage when it arrives at the warehouse. You must also document this damage and complete the forms necessary for reporting this damage. The following are statements of activities that you should do when checking in shipments of merchandise. Some of these statements may or may not be true. On a separate sheet of paper, check the ones that describe what you should do when receiving shipments of merchandise. When you have finished, check your answers according to the procedures established by your instructor.

1. If I observe a damaged container, I should show it to the truck driver and write a description of the damage on the freight bill.
2. I should keep a copy of the freight bill with the damage notation should I have to use it for completing an overage, shortage, and damage report.
3. I should write a description of any overage, shortage and/or damage on the receiving records used by my store.
4. I should write a description of any shortage of merchandise in a shipment on the freight bill and show this to the driver.
5. I should write a description of any overage of merchandise in a shipment on the freight bill and show this to the driver.
6. I should orally report overages, shortages, and damages immediately to my warehouse supervisor.
7. After I have reported the overages, shortages, or damages to my supervisor, I do not need to keep the forms on which I documented the discrepancies.
8. I should if necessary call the carrier's agent to verify the damage, shortage, or overage in the shipment of merchandise.
9. I should keep a copy of each form that I use to document the discrepancy for completing the overage-shortage-damage report.
10. I should follow the procedures that are established by my employer for completing overage, shortage, and damage reports.

INSTRUCTOR'S FINAL CHECKLIST

PREPARING OVERAGE, SHORTAGE AND DAMAGE REPORT

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

The overage, shortage, and damage report prepared by the student exhibited the following characteristics:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. The report was legible....................	[ ]	[ ]	[ ]	[ ]
b. The report was completely filled out......	[ ]	[ ]	[ ]	[ ]
c. The report was error free.................	[ ]	[ ]	[ ]	[ ]
d. The report was mathematically correct.....	[ ]	[ ]	[ ]	[ ]
e. Supporting documents provided had necessary notations on them...............	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PREPARING OVERAGE, SHORTAGE, AND/OR DAMAGE REPORTS.

Your instructor will provide you with a case problem that involves a damaged shipment of merchandise. Complete an OVERAGE, SHORTAGE, AND DAMAGE REPORT.

RETAILING

PALLETIZING, STACKING/PILING MERCHANDISE

INTRODUCTION

When shipments of merchandise are unloaded from a carrier (truck or rail car) at the retailer's receiving area, the containers may not be on storage pallets. If the containers are to be moved to the storage area by either manual or motorized forklifts, they must be safely stacked on pallets to prevent damage to the merchandise within the containers. These same containers may also be placed in storage. To use available space efficiently they may be stacked as unit loads. In this module, you will learn how to palletize, and stack/pile merchandise.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided merchandise and storage space, safely stack/pile the merchandise. All items on the Instructor's Final Checklist should be performed without error.

(2) Provided merchandise and pallets, palletize the merchandise. All applicable items on the Instructor's Final Checklist should be performed without error.

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LEARNING ACTIVITIES

1. LISTEN as your instructor discusses "Palletizing and Stack/Piling Merchandise" and about storage devices (pallets) and how to palletize merchandise. Your instructor will provide a reference.
2. READ Instruction Sheet I, FUNCTIONS AND DESIGN OF PALLETS.

   (or)________________________________

3. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, FUNCTIONS AND DESIGNS OF PALLETS.
4. READ Instruction Sheet II, CHOOSING THE CORRECT PALLET AND PALLET PATTERNS.

   (or)________________________________

5. CHECK YOUR KNOWLEDGE by completing Student Self-Check II, CHOOSING THE CORRECT PALLET AND PALLET PATTERNS.
6. READ Instruction Sheet III, HOW TO STACK/PILE GOODS.

   (or)________________________________

7. CHECK YOUR KNOWLEDGE by completing Student Self-Check III, HOW TO STACK/PILE GOODS.
8. READ Instruction Sheet IV, A UNIT LOAD.

   (or)________________________________

9. READ Instruction Sheet V, HOW TO PALLETIZE A UNIT LOAD.

   (or)________________________________

10. CHECK YOUR KNOWLEDGE by completing Student Self-Check IV, HOW TO PALLETIZE A UNIT LOAD.
11. OBSERVE a demonstration of how merchandise is palletized and stack/piled.
12. PRACTICE stacking/piling goods and palletizing a unit load.
13. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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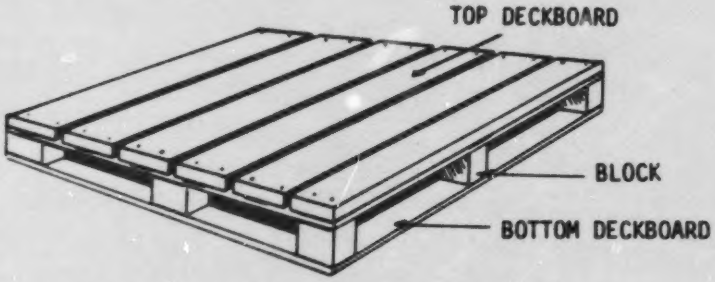
INSTRUCTION SHEET I

FUNCTIONS AND DESIGN OF PALLETS

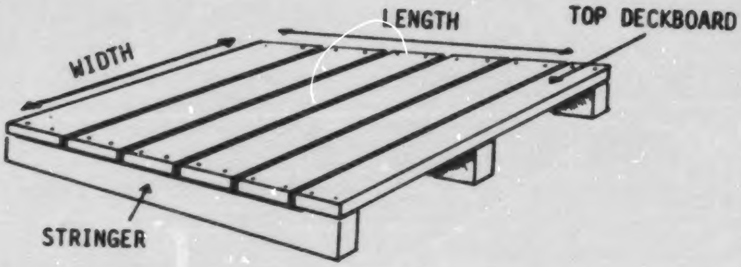
A pallet is a low, hollow, wooden platform that is used to stack and move loads as a single unit. It is designed to be used with forklift trucks.

Pallets are used to reduce the cost of handling merchandise and to increase storage room, as vertical space can be used. Also, pallets help to make an employee's job easier and safer, as mechanical equipment can be used to move pallets.

Pallets help keep merchandise from spoiling, as the merchandise is adequately ventilated during storage and shipment.


TOP DECKBOARD
BLOCK
BOTTOM DECKBOARD

DOUBLE-FACED PALLET WITH FOUR-WAY ENTRY


LENGTH
TOP DECKBOARD
WIDTH
STRINGER

SINGLE-FACED PALLET WITH TWO-WAY ENTRY

DESIGNS OF PALLETS

There are two designs of pallets. They are the two-way pallet and the four-way pallet. The two-way pallet allows forks of a forklift truck or A hand-pallet truck to enter from two sides only and in opposite directions. The four-way pallet allows entry of materials handling equipment from four sides.

There are two types of pallets. They are the single-faced pallet and the double-faced pallet. The single-faced pallet consists of one deck. It has limited use because it is rarely used to store merchandise by placing the pallet on top of another pallet. Another name for a single-faced pallet is a skid.

The double-faced pallet consists of two decks that form the top and bottom surfaces. The bottom surface adds strength to the pallet and results in a better balanced distribution of several loads. Double-faced pallets may be reversible or nonreversible. A reversible pallet may be reversible or nonreversible. A reversible pallet has an identical top deck and bottom deck so that merchandise can be placed on either deck. A nonreversible pallet has a wider spacing on the bottom deck so that a hand-pallet truck can be used.

TYPES AND USES OF PALLETS

A single-faced pallet is an economical and permanent pallet. It is used for bulky loads such as heavy items that are packed in wooden boxes and crates, building materials, and bricks.

A double-faced pallet and nonreversible pallet is a general-purpose pallet. Because of the spacing of the bottom deckboards, forklift and handlift trucks can be used to move merchandise.

A double-faced and reversible pallet is a strong, constructed pallet. It is used for heavy bales or crates.

Another type of pallet similar to the double-faced pallet and nonreversible pallet is more sturdily constructed, designed to support a heavier load, and more expensive. This pallet's top deckboards extend beyond the outer edges of the stringers. It provides a greater measure of safety for merchandise when handling and discharging cargo between ships and piers. It is used for such items as liquids in glass containers.

STUDENT SELF-CHECK I

FUNCTIONS AND DESIGNS OF PALLETS

I. Directions: Select the letter of the best response and put the letter on another sheet of paper. When you have finished, check your answers according to the procedures established by your instructor.

1. Pallets help to: (A) reduce the costs of handling merchandise; (B) increase storage room space; (C) keep merchandise from spoiling; (D) all of these; or (E) none of these.

2. Forks of forklift trucks or hand-pallet trucks can enter from two sides only in opposite directions in a: (A) two-way pallet; (B) four-way pallet; (C) single-faced pallet; or (D) double-faced pallet.

3. Skid is another name for a: (A) two-way pallet; (B) four-way pallet; (C) single-faced pallet; or (D) double-faced pallet.

4. Material-handling equipment can enter from four sides in a; (A) two-way pallet; (B) four-way pallet; (C) single-faced pallet; or (D) double-faced pallet.

5. Reversible or nonreversible is a type of: (A) two-way pallet; (B) four-way pallet; (C) single-faced pallet; or (D) double-faced pallet.

TYPES AND USES OF PALLETS

II. Directions: On a separate sheet of paper, list the type of pallets that would be used for the following items. Check your answers according to the procedures established by your instructor.

1. Liquids in glass containers

2. Wooden boxes or crates

3. Heavy bales or crates

INSTRUCTION SHEET II

CHOOSING THE CORRECT PALLET AND PALLET PATTERNS

When there is a choice of pallets, you should select the right type and the right size for the merchandise being handled. For packages of different sizes, you should select a pallet that will accommodate the packages with the least waste of space. Most merchandise is shipped on 40- by 48-inch pallets because this size fits easily into motor carriers and freight cars.

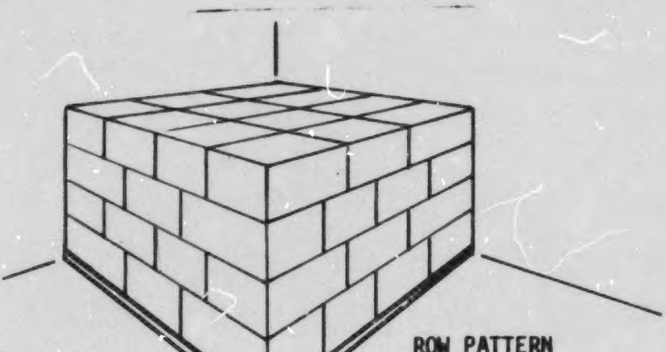
You should make the most efficient use of space when you arrange items on a pallet. Whenever possible, you should use all of the pallet's area. You should place packages so that they do not extend over the sides.

A pallet pattern helps to place packages in a more efficient manner. There are four basic pallet patterns: block pattern, brick pattern, row pattern, and pinwheel pattern.

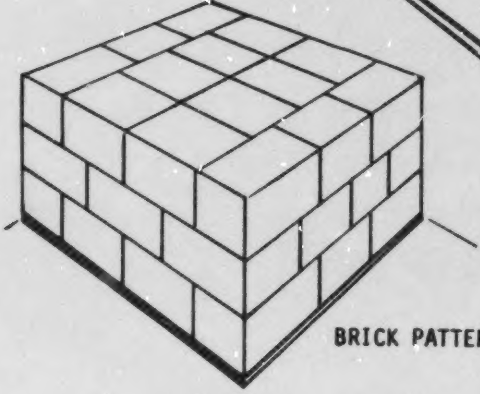
The block pattern is used for packages of equal width and length. Since this pattern is not steady, it may require banding when much movement is involved.

The row pattern, brick pattern, and pinwheel pattern are used for packages of unequal length or width. Packages are placed in an interlocking design. Adjoining layers are placed at 90-degree angles to each other, which makes the load steady.

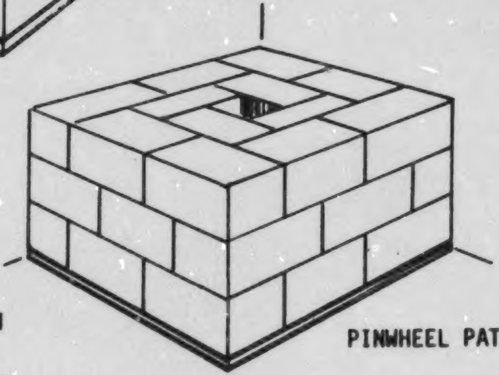
INSTRUCTION SHEET II, (page 2)



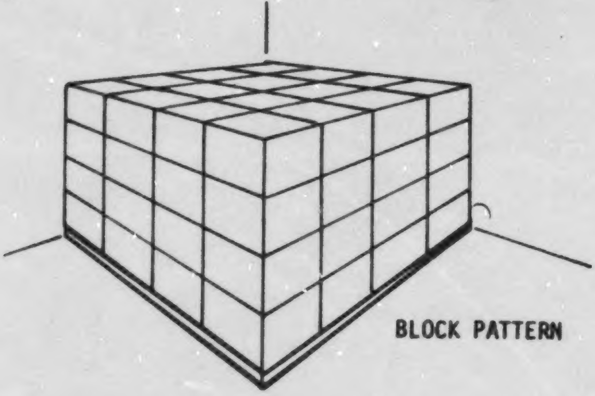
ROW PATTERN



BRICK PATTERN



PINWHEEL PATTERN



BLOCK PATTERN

STUDENT SELF-CHECK II

CHOOSING THE CORRECT PALLET AND PALLET PATTERNS

Directions: Number a sheet of paper from 1-10. If the statement is true, place a T beside the number; if the statement is false, put an F beside the number. Check your answers according to the procedures established by your instructor.

1. When choosing a pallet, you must consider the size of the packages.
2. When choosing a pallet, you must select a pallet to accommodate packages of different sizes with the least waste of space.
3. Motor carriers ship packages on a 48- by 56-inch pallet.
4. You should place packages on a pallet in such a way that they extend over the sides of the pallet.
5. A block pattern is used for packages of equal width and length.
6. A row pattern is used for packages of equal width and length.
7. A brick pattern is used for packages of unequal length or width.
8. A pinwheel pattern is used for packages of equal width and length.
9. A block pattern is not steady and requires bonding.
10. A brick pattern is steady.

INSTRUCTION SHEET III

HOW TO STACK/PILE GOODS

Goods in reserve stock are kept in their original shipping cartons or wrappings. Items of the same kind are stacked together so that items can be found quickly.

When stacking packages of any kind, you should use judgment and care. You should build your pile neatly and firmly to prevent the goods from toppling over on you or someone else.

When stacking/piling goods, observe the following rules:

1. Build the pile neat and straight.
2. Place torn or broken containers on top of the pile.
3. Do not put another carton on top of torn or broken containers.
4. Stack round objects, such as drums or barrels, on end and place a plank on top of each row before placing others above them.
5. An object that must be raised shoulder height or higher should first be raised to the waist. Rest the object and then bend your knees for spring as you lift.
6. Pile/stack bags with the mouth of the bag on the inside of the pile/stack. Keep the pile/stack less than five feet high.
7. Slide an object into place if it must fit tightly in a stack/pile.
8. If a ladder must be used to stack/pile goods, set the ladder up and test it for security and firmness before climbing.

STUDENT SELF-CHECK II

HOW TO STACK/PILE GOODS

Directions: Number a sheet of paper from 1-8. Put an X beside the number of each incorrect statement. When you have finished, check your answers according to the procedures established by your instructor.

1. Build the pile neat and straight.
2. Place torn or broken containers on top of the pile.
3. Place another carton on top of torn or broken containers.
4. Stack round objects on end.
5. Stack round objects on top of each other without anything between them.
6. Do not bend your knees when raising a package to shoulder height.
7. Slide an object into place if it must fit tightly in a stack/pile.
8. Test a ladder for security and firmness before climbing.

INSTRUCTION SHEET IV

A UNIT LOAD

Two or more loads handled as one single unit is known as a unit load. A unit load is stacked or piled on a pallet.

Sometimes a unit load on a pallet must be bonded to protect the load during handling, shipping, and storing. Bonding with glue or bands protects the pallet. The two methods of bonding are over-the-load and horizontal. In over-the-load bonding, bands are placed up and down on items in a load. In horizontal bonding, bands are used to encircle the load. When over-the-load and horizontal bonding are necessary, the horizontal bonds are fastened first.

INSTRUCTION SHEET V

HOW TO PALLETIZE A UNIT LOAD

You should use the following rules to palletize a unit load:

1. Choose the type of pallet to be used according to size, weight, and type of load.
2. Arrange the load on a pallet; never let any of the goods extend over the edges of the pallet.
3. Use the block pattern for items of equal length and width.
4. Use the brick, row, and pinwheel patterns for items of unequal length or width.
5. Place the inner layer first and work out to pallet edges.
6. Distribute unused space evenly when stacking containers that do not completely cover the pallet surface.
7. Crosstie containers (alternate the direction of the containers) to help stabilize the load.
8. Position carton edges as vertical support for additional tiers. (Most cartons have four edges which are reinforced.)
9. Stack round objects on end with a board between each row.
10. Strap the load, if necessary.

STUDENT SELF-CHECK III

HOW TO PALLETIZE A UNIT LOAD

Directions: Write your answers on a separate sheet of paper. If the statement is true, place a T beside its number; if the statement is false, place an F. When you have finished, check your answers according to the procedure established by your instructor.

1. A unit load is stacked or piled on the pallet.
2. There are four methods of banding.
3. In over-the-load bonding, steel bands are used to encircle the load.
4. In horizontal banding, steel bands are used to encircle the load.
5. When choosing a pallet, you must consider the size, weight, and type of load.
6. You should arrange good on a pallet so that the goods extend over the edge.
7. You should place the inner layer first and work out to pallet edges.
8. You should crosstie containers to stabilize the load.
9. You should use carton edges as vertical support.
10. You should use the brick, row, or pinwheel patterns for items of equal length and width.

INSTRUCTOR'S FINAL CHECKLIST

PALLETIZING, STACKING/PILING MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) When stacking/piling merchandise, the student:				
a. Built a firm, neat pile..............	[ ]	[ ]	[ ]	[ ]
b. Placed torn or broken cartons on top..................................	[ ]	[ ]	[ ]	[ ]
c. Stacked round objects on end, using planks to secure the next layer......	[ ]	[ ]	[ ]	[ ]
d. Lifted objects safely................	[ ]	[ ]	[ ]	[ ]
e. Piled bags with mouths to the inside..............................	[ ]	[ ]	[ ]	[ ]
(2) When palletizing a load, the student:				
a. Selected the pallet according to size, weight, and type of load............	[ ]	[ ]	[ ]	[ ]
b. Arranged the load safely on the pallet...............................	[ ]	[ ]	[ ]	[ ]
c. Palletized the containers securely so that the load can be moved safely with material handling equipment	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, PALLETIZING, STACKING/PILING MERCHANDISE.

(1) Your instructor will provide you with merchandise. Safely stack/pile the merchandise in the storage area.

(2) Your instructor will provide you with merchandise, and pallets. Palletize the merchandise.

RETAILING

MOVING AND STORING MERCHANDISE

INTRODUCTION

The retailer's major objective is to provide customers with merchandise and services that will satisfy their needs. To achieve this objective, the retailer must provide merchandise when and where consumers want it. If the consumer is to be able to purchase merchandise and services, these must be placed in a location that will be convenient for them to buy. Therefore, merchandise must be moved from the manufacturer, vendor, or grower to the consumer. Moving and storing merchandise involves many activities, many people, and a lot of equipment. In this module, you will learn how to move and store merchandise in the retail establishment.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activity inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided merchandise to be stored, material-handling equipment, and a storage area, move the merchandise to the storage area and store it. All items on the Instructor's Final Checklist should be acceptably performed.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about safety in handling merchandise using the reference provided by your instructor,

   (or) ______________________________

2. LISTEN and OBSERVE as your instructor discusses safety, in moving and storing merchandise.
3. OBSERVE as your instructor demonstrates how to safely lift, carry, and put down loads.
4. CHECK YOUR KNOWLEDGE of safely handling merchandise by taking Student Self-Check I, SAFETY PRECAUTIONS IN THE RETAIL WAREHOUSE.
5. DEMONSTRATE how to safely lift, carry, and put down loads. Your instructor will observe your demonstration.
6. READ Instruction Sheet I, MATERIAL-HANDLING EQUIPMENT USED IN RETAILERS' RECEIVING AND STORAGE AREAS.

   (or) ______________________________

7. LISTEN to your instructor discuss using material-handling equipment in the receiving and storage area.

   (or) ______________________________

8. OBSERVE a demonstration concerning how to safely move materials with the following material handling equipment:
   1. Conveyor (power, gravity fed)
   2. Forklift (power, non-power
   3. Tow motor
   4. Dollies (4 wheel, 2 wheel)
   5. Basket (2 wheel, 4 wheel)
9. CHECK YOUR KNOWLEDGE of moving materials by taking Student Self-Check II, MOVING MATERIALS IN THE WAREHOUSE AND SALES STORE.
10. PRACTICE, under the direct supervision of your instructor, moving materials with the following equipment:
    1. Dollies
    2. Baskets

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES, (page 2)

11. READ about storing merchandise using the reference provided by your instructor.

    (or) ____

12. LISTEN to and OBSERVE a demonstration concerning how to stock merchandise, supplies and equipment in storage.

13. CHECK YOUR KNOWLEDGE of stocking merchandise in storage by taking Student Self-Check III, STORING MERCHANDISE, SUPPLIES, AND EQUIPMENT.

14. PRACTICE stocking merchandise in storage. Your instructor will provide merchandise and a storage area.

15. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

INSTRUCTION SHEET I

MATERIAL-HANDLING EQUIPMENT USED IN RETAILERS' RECEIVING AND STORAGE AREAS

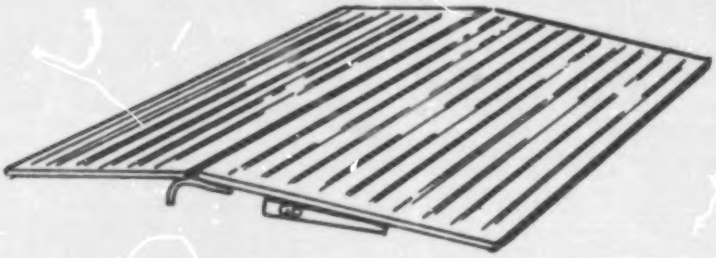
One of the primary tasks of receiving and stock clerks in retailers' warehouses is to move merchandise, and supplies from one area of the warehouse to another area of the warehouse or to the retail sales floor. This task must be performed in a manner that does not decrease the value of the items that are being moved. As a receiving or stock clerk, you must learn how to make numerous decisions concerning the moving of items.

For example:

1. What equipment should I use to move the items?
2. How can I move the items to their destination with the least amount of handling?
3. When do I use power or manual driven equipment?
4. What safety factors must I constantly practice?
5. What equipment do I use when abnormal circumstances exist?

The following illustrations and information are included to help you learn how to make material handling decisions. The illustrated equipment does not include those that are used in all warehousing operations but does include most of the material handling equipment used in retail warehousing and material moving operations.

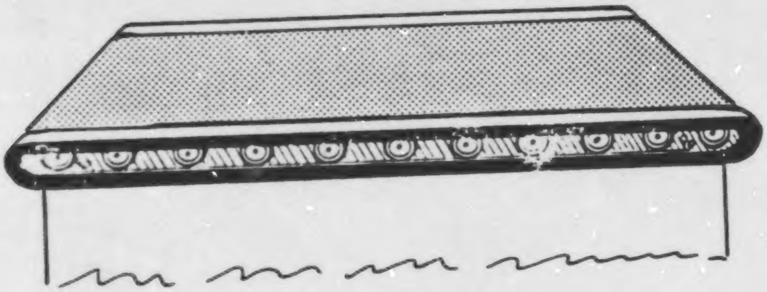
Equipment Used for Moving Material In Retailers' Warehouses



Bridge Plate

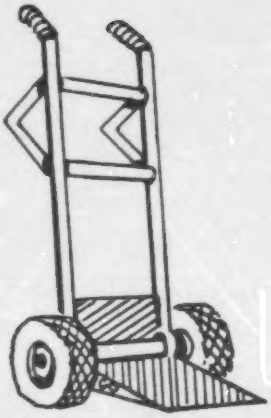
Used for safely joining receiving dock and truck when unloading truck with forklift, two-wheel dolly and four wheel dollies.

INSTRUCTION SHEET I, (page 2)



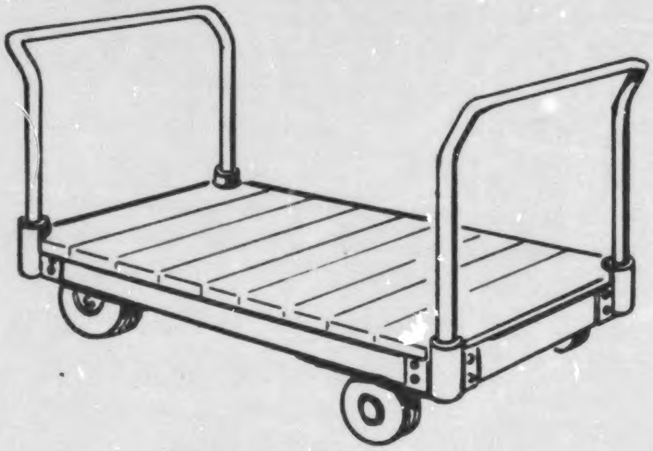
Belt conveyor

Used for moving large numbers of containers from one area to another. This conveyor is motor driven.



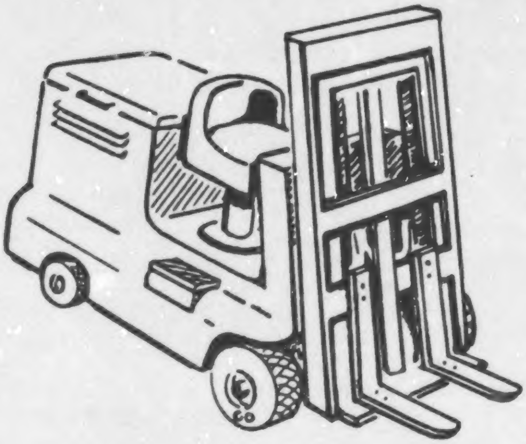
Two wheel dolly

This piece of equipment is used to move a small amount of material from one area of the receiving and storage area to another. it has been the work horse of the receiving and storage area for many years.



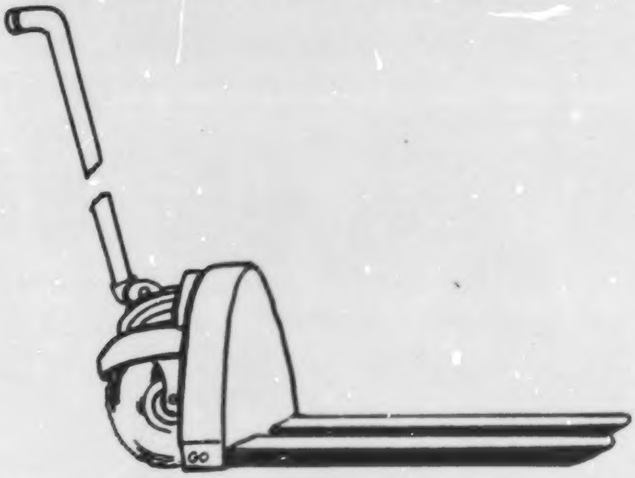
Four wheel dolly

Used for the same material handling jobs as the two-wheel dolly, however, this piece of equipment will carry larger loads. The handles can be removed for easier loading and unloading.



The Forklift

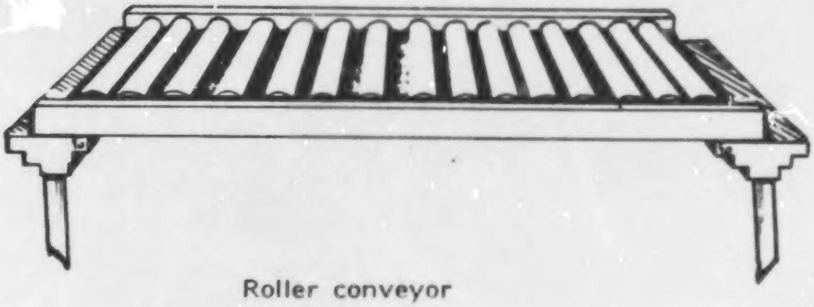
This piece of equipment is the motorized work horse of the receiving and storage area and when used safely with pallets, it is one of the most efficient pieces of equipment in these areas. The forklift should always be operated by safety minded people and should never be used as a toy.



Hydraulic Pallet Lift

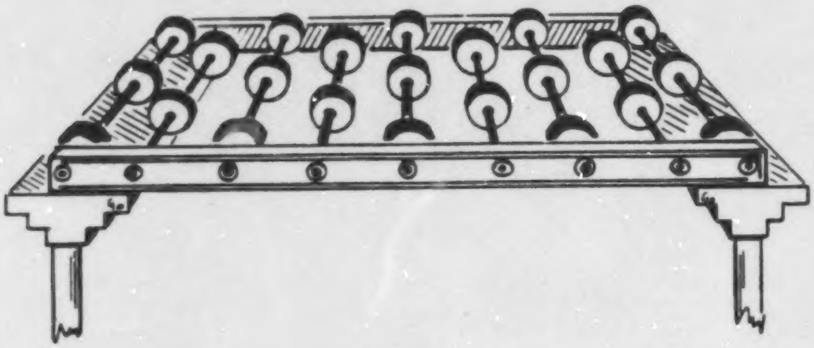
(Pallet-Lift-Truck

A piece of material handling equipment used to move palletized materials short distances.



Roller conveyor

Used for moving containers from one area of receiving and storage to another. Usually roller conveyors are gravity activited. Roller conveyors are set up in chain-like fashion when a large shipment of merchandise is to be moved.



Roller Conveyor

Another type of roller conveyor used similiarily as the others.

STUDENT SELF-CHECK I

SAFETY PRECAUTIONS IN THE RETAIL WAREHOUSE

Directions: You have read about the safety precautions that you should know and practice when you are moving materials in the retail receiving and storage areas. The following questions pertain to these safety procedures. Answer each of these questions on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

Underline the correct word or words that make each of the following sentences correct.

1. The best way to stop accidents from happening is to:

    a. Eliminate the conditions that cause accidents.
    b. Leave trash on the floor after unpacking boxes.
    c. Stack containers on moving equipment so that the containers will block the view of the driver.

2. Before using moving equipment such as ladders, scaffolds, fork lifts, and dollies, the user should

    a. Receive instructions concerning how to properly and safely operate each.
    b. Operate them because they have watched others do it.
    c. Always ask others to use them.

3. When you are working in a retail receiving and storage area, you will be expected to follow acceptable safety precautions. Place a check by the precautions that you will practice when employed as a receiving clerk, stock clerk or salesperson.

    a. _____ I will ask for instructions about how to operate each tool and equipment.
    b. _____ I will clean up trash immediately after opening containers.
    c. _____ I will eliminate conditions which could cause accidents.
    d. _____ I will use tools and equipment only for their designed purpose.
    e. _____ I will wear required protective clothing and safety equipment.
    f. _____ I will perform maintenance on equipment as required.
    g. _____ I will check the condition of the tools and equipment that I use before using them.
    h. _____ I will store tools and equipment in designated storage areas immediately after I have finished using them.
    i. _____ I will avoid horseplay and remain alert when using tools and equipment.

STUDENT SELF-CHECK I, (page 2)

j. ____ To avoid personal injury, I will practice correct lifting procedures.

k. ____ Should I receive an on-the-job injury, I will have it treated immediately.

l. ____ I will always, when carrying loads, stack them so that I can see what is in front of me.

m. ____ I will pick up trash that I see on the floor even though I did not put it there.

n. ____ I will clean up liquid spills on the floor immediately.

o. ____ I will wear clothing that is appropriate for the job.

p. ____ I will observe the safety rules that have been established by my employer.

STUDENT SELF-CHECK II

MOVING MATERIALS IN THE WAREHOUSE AND SALES STORE

Directions: You have read many of the do's and don'ts of moving materials with materials handling equipment. Below are some of these do's and don'ts listed under the piece of equipment with which they are associated. Place a check in the space provided if the activity is a do. Leave it blank if the activity is a don't. Answer these on a separate sheet of paper. Check your answers according to procedures established by your instructor.

Two Wheel Hand Truck (Two-Wheel Dolly)

1. _____ Use this piece of equipment when moving a small quantity of material a short distance.
2. _____ Place materials on this piece of equipment by rocking the stack of containers back from the dollie and slipping the front platform under the stack. Carefully pull both the stack of material and the dollie back toward you.
3. _____ Stack containers evenly before loading the materials.
4. _____ Stack containers only as high as the protective webbing on the back of the dollie.
5. _____ Avoid stacking containers on the dollie to a height that will block vision.
6. _____ When moving the material, be alert for others who are moving material.
7. _____ When not using the two-wheel dollie, place it in its appropriate storage space.

The Platform Truck (Four Wheel Dollie)

1. _____ Stack containers evenly and take care when turning.
2. _____ Use when larger containers will not properly fit on the two-wheel dollie.
3. _____ Be cautious when going through doors. Remember, someone may be coming the opposite way.

STUDENT SELF-CHECK II, (page 2)

Tractor-Trailer (T[illegible] Motor)

1. _____ Do not operate this vehicle unless it is throughly checked-out by your supervisor.
2. _____ Check the oil level in the engine before operating a gasoline fueled tractor.
3. _____ Avoid high speeds when operating this piece of equipment.
4. _____ Always double check to determine that the dollies being pulled are hooked.
5. _____ When unhooking dollies, always check to assure that they will not roll.
6. _____ Practice the safety procedures established by your employer when operating the tractor.

Fork Lift

1. _____ Do not operate the fork lift unless you have been trained by your employer.
2. _____ Check the oil level in gasoline powered fork lifts before operating.
3. After you have been throughly trained and checked-out for operating the fork lift, you should:
    a. _____ Observe to determine that the prongs of the lift are completely under the pallet that supports the load before the load is picked up.
    b. _____ Drive the fork lift at safe speeds.
    c. _____ Never use the fork lift for a plaything.
    d. _____ Avoid making sudden stops.
    e. _____ Learn the lifting capacity of the fork lift, and avoid lifting loads that exceed its lifting capacity.

STUDENT SELF-CHECK II, (page 3)

Pallets

1. _____ Inspect pallets to determine that they are in good repair.
2. _____ Stack and balance containers and materials when putting them on the pallet.
3. _____ Use stacking patterns that are recommended by your employer.

Pallet Lift Truck

1. _____ Use the pallet lift truck when a fork lift is too large or when moving materials short distances.
2. _____ Observe safety precautions when moving material with the pallet lift truck.
3. _____ Stack and balance materials on the pallet when using the pallet lift truck.
4. _____ Avoid stacking materials above visual height.

Conveyors

1. _____ When setting up roller conveyors, it is best to have help.
2. _____ Place containers on conveyors in balanced positions.
3. _____ Observe to assure that containers are freely moving.
4. _____ Remove portable conveyors and store them in the designated area.
5. _____ Keep your hands out of the mechanism of the belt conveyor.
6. _____ Turn off belt conveyors when they are not in use.
7. _____ Avoid wearing loose clothing when using belt conveyors.
8. _____ Follow safety procedures that are established by your store owner/manager.

STUDENT SELF-CHECK II, (page 4)

Hand Carrying Materials

1. _____ If load is too heavy, ask for help.
2. _____ When preparing to pick up a load, spread your feet apart about 8 to 10 inches.
3. _____ Position feet close to the object that is being lifted.
4. _____ Bend your knees outward and crouch down.
5. _____ Keep your back straight.
6. _____ Pull your chin in so that the neck and head are in a straight line.
7. _____ Grip the container on opposite top and bottom corners.
8. _____ Push up, using your leg muscles.
9. _____ Hold the load close to your body.
10. _____ Put the load down by:
    - a. _____ Keeping the load close to your body.
    - b. _____ Lowering the load with your leg muscles.
    - c. _____ Bending the knees outward, keeping the back straight as possible.
    - d. _____ Placing a corner that is away from your fingers down on the floor first.
    - e. _____ Pulling your hands away as you put down the container.
    - f. _____ Pushing heavy loads on tables and shelves with your arms or body.

STUDENT SELF-CHECK III

STORING MERCHANDISE, SUPPLIES, AND EQUIPMENT

Directions: On a separate sheet of paper answer each of the following questions about how to store merchandise, supplies and equipment. When you have finished, check your answers according to the procedures established by your instructor.

1. When storage places are being chosen, the person making the decision asks four questions. Check the four questions that this person must answer when selecting places for storage.

   a. _____ Who will be the warehouse supervisor?

   b. _____ What kind of merchandise/product is to be stored?

   c. _____ How much will I pay the warehouse workers?

   d. _____ What space is available for storing products?

   e. _____ Can the stored merchandise be easily located when it is needed?

   f. _____ Will the product be secure from damage, loss, and theft?

2. Check the following that are places for storage.

   a. _____ Cold-storage rooms

   b. _____ Bays

   c. _____ Racks

   d. _____ Bins

   e. _____ Line storage

   f. _____ Conveyors

   g. _____ Two-wheel dollies

3. Circle the letter of the correct answer.

   a. Stocking is:

      (1) placing items into storage areas and removing them when they are needed.
      (2) counting items of merchandise that are in storage areas.

STUDENT SELF-CHECK III, (page 2)

4. When stocking merchandise you perform specific activities. Listed on this page are some activities that are performed in retailers' storage areas. Check the ones that you should do when stocking merchandise.

   a. ____ Read the warehouse locator map to find out where to place the merchandise or supplies.

   b. ____ Ask your supervisor or manager where to place items that are not included on the warehouse locator map.

   c. ____ Select the best way to move the merchandise or supplies to the designated storage area.

   d. ____ Use the system set up by your store for placing merchandise or supplies into storage areas.

   e. ____ Stock the merchandise into storage areas with like items.

   f. ____ If there is like merchandise in the storage area, rotate the stock. Use the FIFO method of stocking merchandise in storage.

   g. ____ If bin tickets are used in the warehouse, write on the ticket the appropriate information.

   h. ____ When placing merchandise in security rooms, drawers, or areas close and lock the doores, drawers or gates.

   i. ____ Avoid placing containers on top of unprotected products.

   j. ____ Know and practice safety procedures when moving and placing items in storage.

INSTRUCTOR'S FINAL CHECKLIST

MOVING AND STORING MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
I. In the process of moving the materials the student:				
1. Observed acceptable safety procedures	[ ]	[ ]	[ ]	[ ]
2. Selected appropriate equipment for moving the material	[ ]	[ ]	[ ]	[ ]
3. Safely operated the equipment	[ ]	[ ]	[ ]	[ ]
4. Moved the material without damaging any of it	[ ]	[ ]	[ ]	[ ]
5. Properly loaded material on equipment	[ ]	[ ]	[ ]	[ ]
6. Hand-carried materials properly, avoiding potential self-injury	[ ]	[ ]	[ ]	[ ]
7. Unloaded materials from equipment safely without damaging materials	[ ]	[ ]	[ ]	[ ]
8. Avoided causing injury to associates	[ ]	[ ]	[ ]	[ ]
9. Transported the merchandise to the correct location	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
II. When stocking the merchandise, supplies and equipment in storage, the student:				
1. Followed all acceptable safety procedures ...	☐	☐	☐	☐
2. Located the correct storage area on the warehouse locator before stocking	☐	☐	☐	☐
3. Selected the best method and equipment for moving the items	☐	☐	☐	☐
4. Stocked the items with like products, supplies and equipment	☐	☐	☐	☐
5. Rotated the stock	☐	☐	☐	☐
6. Wrote applicable information on the bin ticket	☐	☐	☐	☐
7. Stocked all items in a manner that would not present a safety hazard	☐	☐	☐	☐
8. Secured storage area after completion of stocking activities	☐	☐	☐	☐

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, MOVING AND STORING MERCHANDISE.

Your instructor will provide you with merchandise to be stored, material-handling equipment, and a storage area. Move the merchandise to the storage area and store it.

RETAILING

OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR

INTRODUCTION

Retail establishments must have storage space because of the large numbers of items of merchandise that are sold. Storage space is required because the amount of merchandise required to meet the immediate needs of the customers cannot be stored in the retail store area. Therefore, retailers maintain a surplus of merchandise in storage warehouses. The items of merchandise must be stored so that they can be removed quickly if the customers need them. As an employee of a retail establishment, you must be able to properly remove merchandise from storage and deliver it to either the customer or the retail sales floor of your store. In this module, you will learn how to obtain merchandise from storage and deliver it to the sales floor area.

DIRECTIONS

Read the objective below. If you think that you are already able to perform the task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a department stock requisition form, goods to be delivered, material-handling equipment, identify and deliver the merchandise to the requested location. When delivery has been completed, there must be no damage to the merchandise, it must be delivered to the correct location, and there must be no damage to the merchandise or injury to the handler or fellow workers.

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LEARNING ACTIVITIES

1. READ about safety in the reference provided by your instructor.

   (or) ____________________

2. READ Instruction Sheet I, WHY RETAILERS HAVE WAREHOUSES, STOCKROOMS, AND STORAGE AREAS.

   (or) ____________________

3. CHECK YOUR KNOWLEDGE of pulling stock from storage by taking Student Self-Check I, OBTAINING MERCHANDISE FROM THE STOCKROOM OR WAREHOUSE.

4. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

WHY RETAILERS HAVE WAREHOUSES, STOCKROOMS, AND STORAGE AREAS

Have you ever stopped to think about the many different items of merchandise that retailers must have on hand to serve the varied needs of their customers? Probably not, but if you did, you would be amazed not only at the number of different items but at the many different sizes, colors, and quantities that are necessary to adequately serve the customers' needs.

How large would a retail sales store have to be to adequately serve the needs of their customers if all of the merchandise had to be placed on display on the retail sales floor? The amount of space would be amazing. How then does the retailer solve this problem? If you said by storing or by warehousing surplus merchandise, you would be absolutely correct.

Now that you have solved this problem, think about another one. Are the surplus items in the warehouse, stockroom, or storage area going to stay there? If you say "of course not," you know that storage is only a place to keep merchandise until it is needed to:

--Fill customers' needs.
--Replace merchandise on the retail sales floor when displayed stock has been sold.

If the merchandise that is stored in the stockroom, the warehouse, or the storage area is to be sold, it must be moved to the retail sales floor so that the customers can see it. In many stores this is done in the following manner:

1. The department manager or a salesperson writes a requisition for the merchandise. The requesition is sent to the warehouse or storage area.

2. A stock clerk reads the department requisition, which contains the stock number, size, color, and weight. He/she selects the best way to move the merchandise and pulls the merchandise from the storage racks or bins.

   If the stock clerk is unable to remember the location of the stored merchandise, he/she refers to the warehouse locator chart, which shows where the merchandise can be found.

3. When removing the merchandise from storage, the stock clerk writes on the "bin ticket" the number of the items that are removed and subtracts this number from the "Total On Hand."

4. The merchandise is then moved to the requesting department with appropriate material-handling equipment and/or by hand carrying to be put on display.

INSTRUCTION SHEET I, (page 2)

5. A copy of the requisition with the number of items sent is returned with the merchandise to the department so that the order can be checked when it is placed on display on the sales floor.

6. A copy of the requisition is sent to bookkeeping.

Some stores remove merchandise from storage in the following manner:

1. Only one model of the merchandise is displayed on the sales floor; for example, large appliances.

2. The customer, after talking with the salesperson, decides to purchase the item and wishes to take the merchandise.

3. After the sales contract is written, the salesperson gives the customer a copy of the contract and sends one to the warehouse.

4. The customer is given instructions about how to locate the pick-up area. The item of merchandise is pulled from storage by warehouse personnel and loaded onto the customer's vehicle after the customer has shown proof of purchase.

5. The warehouse personnel records the transaction on the bin ticket and usually asks the customer to sign a form that indicates that the pick-up was made.

STUDENT SELF-CHECK I

OBTAINING MERCHANDISE FROM THE STOCKROOM OR WAREHOUSE

Directions: You are an employee of X Company Department Store working in the warehouse. A requisition for stored merchandise has been sent from the hardware department, and you are to fill the order. Listed below are the activities that you must perform to fill the requisition; however, included in the list are some activities that you will not do. Place a check (✓) by the activities that you will do to fill the request for merchandise. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

1. I will read the requisition from the hardware department and decide what kind of moving equipment I will need for pulling the stock.
2. I will observe safety rules when pulling stock from storage.
3. I will refer to the warehouse locator chart when pulling merchandise from storage if I cannot find it.
4. I will record the number of each item that I pull from storage on the requisition form.
5. I will record the number of each item pulled from stock on the "bin ticket" and subtract it from the total shown on it.
6. After filling the order for the department, I will properly throw away the requisition form.
7. I will be certain to pull the requested merchandise according to quantity, model, size, color, and weight.
8. I will lock security storage containers after pulling merchandise.
9. After filling the order, I will deliver it safely to the requesting department with a copy of the requisition attached.
10. I will move the merchandise carefully and stack it on the moving equipment so that I will avoid dropping any of the merchandise.
11. I will send a copy of the requisition to the bookkeeping department.

INSTRUCTOR'S FINAL CHECKLIST

OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of obtaining merchandise from the warehouse and delivering it to the retail sales floor, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Read the requisition for merchandise needed .	[ ]	[ ]	[ ]	[ ]
b. Selected the appropriate material-handling equipment	[ ]	[ ]	[ ]	[ ]
c. Pulled the correct requested merchandise and adjusted the "BIN TICKET"	[ ]	[ ]	[ ]	[ ]
d. Safely lifted and carried the correct materials from storage	[ ]	[ ]	[ ]	[ ]
e. Recorded the number of pulled items of merchandise on the requisition form	[ ]	[ ]	[ ]	[ ]
f. Safely moved the requested merchandise to designated area	[ ]	[ ]	[ ]	[ ]
g. Avoided dropping or damaging any of the merchandise during the pulling and transporting process	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, OBTAINING MERCHANDISE FROM STORAGE AND DELIVERING TO SALES FLOOR.

Your instructor will provide you a department stock requisition form, goods to be delivered, material-handling equipment and location transfer forms. Move the requested merchandise to the designated area.

RETAILING

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

INTRODUCTION

Marking prices on merchandise is one of the most important tasks in a retail establishment. The price information is used by the salespeople, the customers, the buyers, and the store management team. In this module, you will learn how to price mark and change prices on merchandise.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided merchandise, price tickets, price marking tools, price ticket fasteners, and a price list (retail), price mark each item of merchandise. Each item of merchandise must be clearly marked with the correct price and store information.

(2) Provided price marking tools and supplies, a price change list, and merchandise, change the prices on the merchandise. When completed, each item of merchandise on the price change list must be correctly and legibly price marked.

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LEARNING ACTIVITIES

1. READ about price marking goods in the reference provided by your instructor.

   (or) ______________________________

2. CHECK YOUR KNOWLEDGE of price marking by taking Student Self-Check I, PRICE MARKING MERCHANDISE.

3. LISTEN AND OBSERVE as your instructor discusses and demonstrates price marking equipment and procedures.

4. PRACTICE price marking merchandise in the learning laboratory.

5. READ Instruction Sheet I, REASONS FOR CHANGING PRICES OF MERCHANDISE ON THE SALES FLOOR.

   (or) ______________________________

6. READ Instruction Sheet II, HOW TO MAKE PRICE CHANGES.

7. OBSERVE as your instructor demonstrates how to change prices on merchandise.

8. PRACTICE changing prices on merchandise in the learning laboratory. ASK your instructor for the materials.

9. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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STUDENT SELF-CHECK I

PRICE MARKING MERCHANDISE

Directions: Read the following statement about price marking merchandise. If the statement is True, write plus (+). If the statement is False, write a minus (-). Write your answers on a separate sheet of paper. When you have finished, ask your instructor for the answers.

1. Prices are marked on merchandise to give information to customers, salespeople, and the store management team.

2. All price tickets look the same.

3. Merchandise that is fast selling may not be price marked.

4. Price tickets are designed to be used for varieties of merchandise.

5. Price marking is done in the marking area of warehouses, on the salesfloor of many stores, and in special rooms in some stores.

6. When you are marking prices on merchandise, you will receive price marking information from the store buyer or your store owner/manager.

7. Price marking is done with price marking machines and with hand-held rubber stamps.

8. Price tickets may have the following information printed on them: the retail price, cost-price code, color, size, department number, style number, and date.

9. As a price marker you will have to make the following decisions: what kind of price ticket to use for each item of merchandise, what information to put on the price ticket, how many tickets must be made, and how to attach the price ticket.

10. When hand writing price tickets, each ticket must be written neatly and clearly.

11. Delays in serving customers will be caused by poorly written and poorly printed price tickets.

12. A sale may be lost because an item is not price marked.

13. Computer-based methods are now used to price ticket many items of merchandise.

STUDENT SELF-CHECK I, (page 2)

14. Computer-based marking can be used only if the store where you work has the following: an automatic reading device, an automatic cash register with a reading device, and a computer that stores the information printed on the computer-based price ticket.

15. Price ticket information is given to the marker on an invoice apron, on a copy of the purchase order, or on a sample of the merchandise.

16. The price marker's job is extremely important because incorrect pricing can cause the store to lose money, cause customer delays, and cause customer dissatisfaction if they have been over-charged.

INSTRUCTION SHEET I

REASONS FOR CHANGING PRICES OF MERCHANDISE ON THE SALES FLOOR

As a salesperson or stock clerk in a retail establishment, you may have to change prices on merchandise that is displayed on the sales floor. Price changing must be done when prices increase or decrease. Price reductions occur when there are:

--Special sales

--Sales to reduce inventory

--Fashion changes

--Over purchase sales

--Special purchase sales

--End-of-season sales

--Introductory sales

Price increases occur when the wholesale price charged to the retailer is increased by the vendor. When prices need to be changed, your department manager, buyer, or store owner will give you a price list. It will list the merchandise for which price changes are to be made and the new price to be placed on the price ticket. It will be your responsibility to locate the merchandise and to change the prices. You will also have to verify that the price changes have been made by documenting it on the price list.

INSTRUCTION SHEET II

HOW TO MAKE PRICE CHANGES

Price changes can be catagorized as: (1) mark ups and (2) mark downs.

When you are requested to mark up the retail price ticket of merchandise, it is best that you:

1. Obtain the price change list from your supervisor.
2. Collect the tools that will be needed.
3. Locate the merchandise.
4. Remove all prices of merchandise from the display prop or fixture.
5. Move the merchandise from the sales floor to the stock room.
6. Remove the old price tag.
7. Request or print new price tags or tickets that show the new price.
8. Attach the new price tags or tickets to the merchandise.
9. Place a check or your initials by the name of the article on the price change list to indicate that the price has been changed.
10. Check the price change list to determine that all changes have been made.
11. Return the merchandise to the sales floor.
12. Restock the merchandise on the display prop or fixture from which you removed it.
13. Return the price change list to your department manager or your supervisor.

When you are requested to mark down the price of merchandise, it is best that you:

1. Obtain the price change list from your supervisor.
2. Collect the tools that will be needed.
3. Locate the merchandise.
4. Remove all pieces of merchandise from the display prop or fixture.

INSTRUCTION SHEET II, (page 2)

5. Draw a line through the old price as indicated by the price ticket.

6. Write the reduced price as indicated by the price change list on the price tag of the merchandise.

7. Write clearly and legibly so that all store employees and customers can read the change.

8. Place a check mark or your initials beside the name of the article on the price change list to indicate that the price has been changed.

9. Check the price change list to determine that you have made all of the indicated mark downs.

10. Restock the merchandise on the display prop or fixture from which you removed it.

11. Return the price change list to your department manager or your supervisor.

INSTRUCTOR'S FINAL CHECKLIST

PRICE MARKING AND CHANGING PRICES ON MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each Item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All Items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any Items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) In the process of price marking merchandise, the student:				
a. Selected the appropriate price marking tools for each item	[ ]	[ ]	[ ]	[ ]
b. Selected the appropriate price ticket for each item	[ ]	[ ]	[ ]	[ ]
c. Price marked each item clearly	[ ]	[ ]	[ ]	[ ]
d. Marked each price ticket with the correct information as indicated by the retail price list	[ ]	[ ]	[ ]	[ ]
e. Securely attached the corresponding price ticket to each item	[ ]	[ ]	[ ]	[ ]
2. In the process of changing prices on merchandise, the student:				
a. Gathered all the necessary equipment	[ ]	[ ]	[ ]	[ ]
b. Marked down prices by slashing through the old price and writing the new one or used the price re-marking machine	[ ]	[ ]	[ ]	[ ]
c. Marked up the prices by making a new ticket	[ ]	[ ]	[ ]	[ ]
d. Inspected the price for accuracy	[ ]	[ ]	[ ]	[ ]
e. Wrote the information correctly and legibly	[ ]	[ ]	[ ]	[ ]
f. Checked off each item of merchandise on the price change list to indicate that the change was made	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, PRICE MARKING AND CHANGING PRICES ON MERCHANDISE.

(1) Your instructor will provide a variety of merchandise and price marking tools and supplies. Price mark each item of merchandise.

(2) Your instructor will provide you with a price change list, price marking tools, price tickets, and merchandise. Change the prices on the merchandise.

RETAILING

STOCKING/SHELVING MERCHANDISE

INTRODUCTION

One of the tasks that you must do as an employee of a retail establishment is to check in and shelve/stock merchandise on the sales floor. This task is very important because the customers must be able to see the merchandise and know its price if they are going to purchase it. Merchandise not easily seen is merchandise that is not easily sold. In this module, you will learn how to shelve/stock merchandise on the retail store sales floor.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided merchandise, a price list, display props/fixtures, stocking tools, and supplies, check in and stock the merchandise. When completed, all applicable items on the Instructor's Final Checklist must be acceptably performed.

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA.

   (or) ____

2. CHECK YOUR KNOWLEDGE of checking in merchandise by taking Student Self-Check I, CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA.

3. READ Instruction Sheet II, STOCKING SHELVING MERCHANDISE.

   (or) ____

4. READ Instruction Sheet III, OPENING CARTONS OR CASES.

   (or) ____

5. CHECK YOUR KNOWLEDGE by taking Student Self-Check II, OPENING CARTONS OR CASES.

6. PRACTICE opening cartons or cases.

   (or) ____

7. READ about marking goods in the reference provided by your instructor.

   (or) ____

8. READ Instruction Sheet IV, PROPER PRICE MARKING.

   (or) ____

9. CHECK YOUR KNOWLEDGE by taking Student Self-Check III, PROPER PRICE MARKING.

10. READ Instruction Sheet V, STOCKING SHELVES AND RACKS. READ about how to stock merchandise. Your instructor will provide a reference.

    (or) ____

11. READ Instruction Sheet VI, HOW TO SHELVE/STOCK MERCHANDISE ON THE STORE/DEPARTMENT SALES FLOOR.

    (or) ____

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LEARNING ACTIVITIES (Continued)

12. LISTEN and OBSERVE as your instructor discusses and demonstrates how to shelve/stock merchandise on the sales floor.

    (or)____

13. CHECK YOUR KNOWLEDGE by taking Student Self-Check IV, STOCKING SHELVES AND RACKS.

14. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

INSTRUCTION SHEET I

CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA

In large retail establishments, after shipments of merchandise have been received and processed in the warehouse, the merchandise is sent to the designated department. The stockperson sends the merchandise to the proper department with a copy of the original purchase order which is used to verify the order.

The department salesperson, using a copy of the original purchase order, does the following activities:

1. Counts the number of items received from the stockroom or warehouse and writes this number on the purchase order beside the printed number.

2. Checks the merchandise for tears, cracks, chips, or other signs of damage.

3. Records any discrepancies on the purchase order.

4. Returns damaged merchandise to the stockroom or warehouse.

5. Initials or signs the copy of the in-store invoice and gives it to the department manager.

Counting and examining merchandise on the sales floor is extremely important. Each time the merchandise is checked, the chance of costly error is reduced. Merchandise checks are done to:

--Reduce the chances that damaged merchandise will be sold to customers.
--Reduce department inventory losses.
--Reduce the errors in shipments of merchandise that can be overlooked by the receiving clerks or stock clerks.

STUDENT SELF-CHECK I

CHECKING IN DEPARTMENT MERCHANDISE RECEIVED FROM THE RECEIVING AREA

Directions: As a salesperson in a retail establishment you will be asked to check in merchandise received from the warehouse and/or the stockroom. The following statements describe what you will do when checking in the merchandise. Some of these statements are true; others are false. On a separate sheet of paper, place a plus (+) sign by the true statements. Place a minus (-) sign by the false statements. When you have finished, check your answers according to the procedures established by your instructor.

1. I will count the number of items received from the stockroom or warehouse and write the count on the copy of the purchase order that I receive with the merchandise.
2. I will check the merchandise for damage.
3. I will record any damage or count errors on the copy of the purchase order.
4. After I have checked in the merchandise, I will throw away the copy of the purchase order.
5. After I have checked in the order of merchandise, I will write any observed errors on the copy of the purchase order and give the copy to my department manager.
6. I will throw away any damaged merchandise.
7. I will return any damaged merchandise to the stockroom or warehouse and write these damages on the copy of the purchase order.
8. I will check merchandise shipments received from the warehouse or stockroom to help reduce costly errors such as inventory storage and pilerage.
9. I will check merchandise at the warehouse, stockroom, and the sales floor to help management eliminate costly payments for non-delivered or damaged merchandise.
10. When I go to work as a salesperson, I will ask how I should check in merchandise in my assigned department.

INSTRUCTION SHEET II

STOCKING/SHELVING MERCHANDISE

As you begin this section, keep in mind that "merchandise not easily seen by customers is merchandise that is not easily sold to customers." Properly shelved/stocked merchandise will often sell itself to the customers, because many manufacturers have designed packages that are intended to catch the eye of the customer. This can best be seen when you are shopping in your hometown grocery store or supermarket.

The next time you are out shopping, make it a point to observe how the merchandise in the stores you visit is displayed. The stock clerks and sales people who shelved/stocked the merchandise, must be able to:

--Know where to place the merchandise on the sales floor.

--Know what kind of display props or fixtures to place it on or in.

--Know what tools would be needed to do the job.

--Know what safety measures to follow.

--Know how and be able to price mark the merchandise.

--Safely open the packages.

--Clean the display props and fixtures.

--Clean or dust the merchandise.

--Place the merchandise on or in the prop or fixture so that customers could easily see it.

--Move the old merchandise to the front of the new merchandise.

--Place the merchandise on the display prop or fixture so that it will not fall.

--Lock merchandise if it is placed in security props or fixtures.

--Clean up and dispose of the empty packages and packing material.

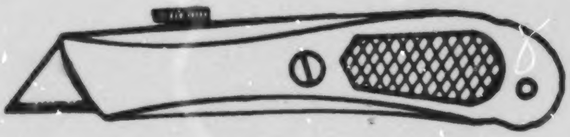
--Return all of the tools and stocking equipment to storage.

This description of the stocking/shelving process is intended to show you how important the process is. If it is done safely, thoughtfully, and is well-planned, customers will be well served and merchandise will flow from the sales floor to the customer with ease.

INSTRUCTION SHEET III

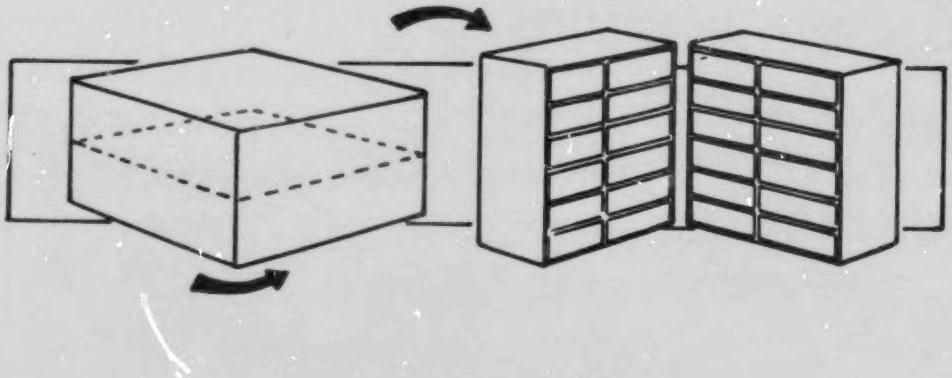
OPENING CARTONS OR CASES

When stocking merchandise, there are several things which have to be done. First, you have to open the carton or case safely using a case cutter--a metal holder containing a blade which can be adjusted to fit the thickness of the carton or case. (See the illustration provided below.) Your instructor will demonstrate how to use a case cutter safely.



Follow these steps in cutting a two-layered case:

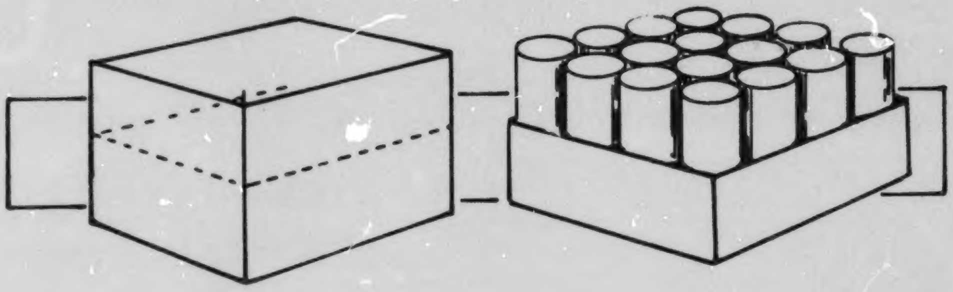
1. Adjust the blade to the thickness of the carton or case being opened.
2. Use a blade that is sharp. Dull blades can slip out of the item being cut and cut you.
3. Always cut away from your body.
4. When opening a carton that contains more than one layer, cut the full length of each of the four sides halfway between the top and the bottom, turning the case after each cut.
5. Turn the case on its side and split it open. This exposes all merchandise for price marking.



INSTRUCTION SHEET III, (page 2)

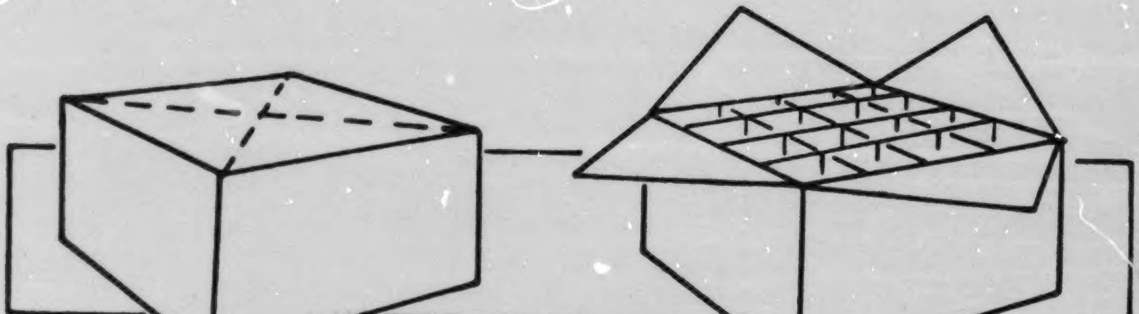
Follow these steps in cutting a one-layered case:

1. Adjust the case cutter to the thickness of the carton or case.
2. Cut around the lid on three sides, beginning on the side fartherest from you.
3. Pull the lid up and cut the fourth side from the inside of the top.



Follow these steps in opening boxed products:

1. Using the case cutter that has been adjusted to the thickness of the carton, safely cut an "X" on the top of the carton. Take care not to cut into the boxed products.
2. Pull back the cut flaps for price marking and removing the products.

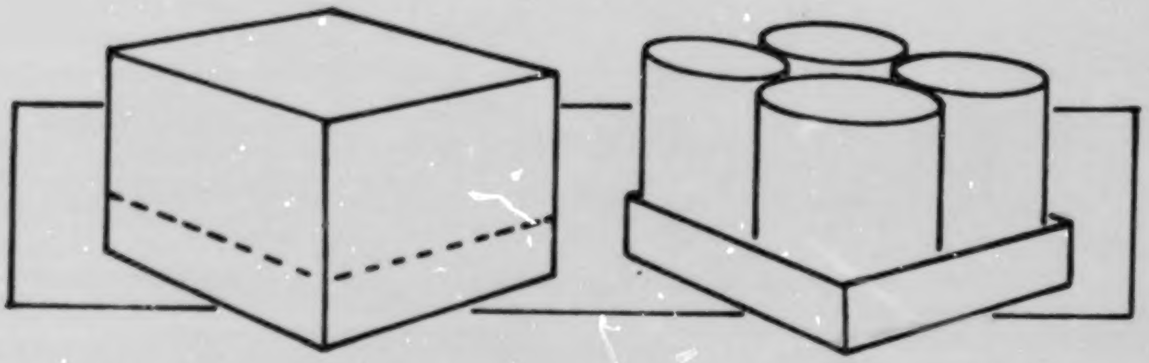


INSTRUCTION SHEET III, (page 3)

Follow these steps in opening cartons for display stacks:

1. Using the case cutter that has been adjusted to the thickness of the carton, safely cut the carton one-fourth of the way up from the bottom on each side.

2. Remove the top and you will have a tray that can be stacked for display after the merchandise has been priced marked.



STUDENT SELF-CHECK II

OPENING CARTONS AND CASES

Directions: Check your knowledge of how to open a case properly by matching the following procedures with the situations. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

Case Cutting Situations:

1. The case contains boxed products.
2. The case contains two layers of cans.
3. Two layers of products are to be displayed in the case.
4. The case contains one layer of merchandise.
5. The case contains one layer of merchandise which is to be displayed in case.

Case Cutting Procedures:

a. The case is cut halfway between the bottom and top on all four sides.

b. The top of the case is cut off.

c. An "X" is cut on the top of the case.

d. The case is cut about one-fourth of the way up from the bottom on all four sides.

e. The cuts are made on all four sides of the carton, one-fourth of the way up from the bottom and one-fourth of the way down from the top.

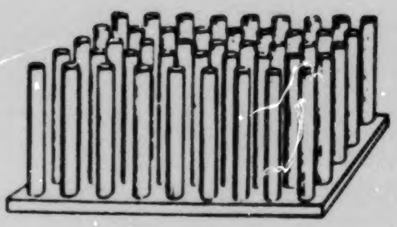
INSTRUCTION SHEET IV

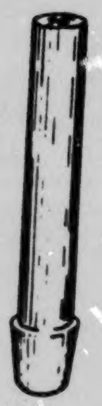
PROPER PRICE MARKING

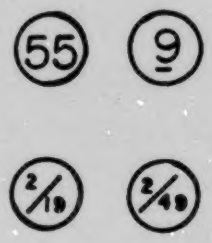
Price marking is the procedure used to give information about the price of merchandise. Incorrect price marking can cause money losses and time delays. It may also cause inconvenience and anger customers. You will want to learn the correct way to price mark so that activities will move smoothly in your retail store.

Basically, there are four kinds of price markers used in retail stores. They are the stick stamp, the band stamp, the label gun, and the felt tip marker.

1. The Stick Stamp (See illustration.):
   - a. A set of individual rubber stamps which are mounted on a handle; they usually contain prices from 1¢ to 99¢.
   - b. Each stamp marks only one price.
   - c. Each contains single and frequently used multiple-price figures and a special stamp for blocking out prices in price changes.
   - d. The stamp makes a clear price mark when used with a well-inked pad.

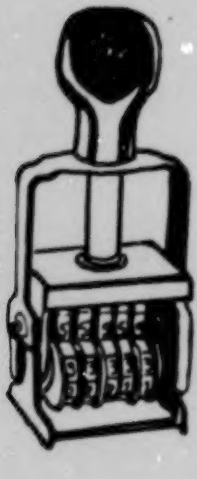






2. The Band Stamp (See illustration.):

   a. The band stamp is a price marker that has rubber figures and images mounted on changeable bands.
   b. It is adjustable and, when used with a good supply of ink, it produces an easily read price.
   c. It is used when many items with different prices are being stocked.

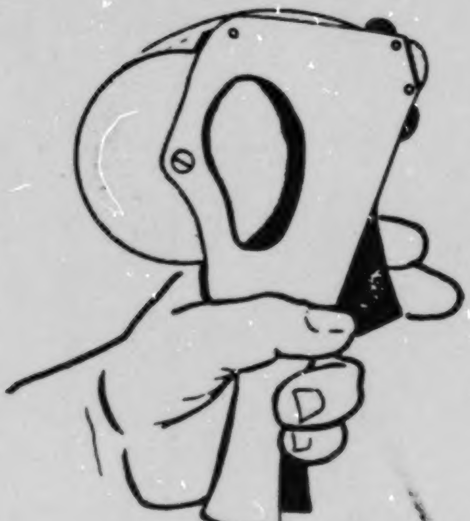


8¢ 96¢ 60¢ $698 $103

BAND STAMP PRICE MARKINGS

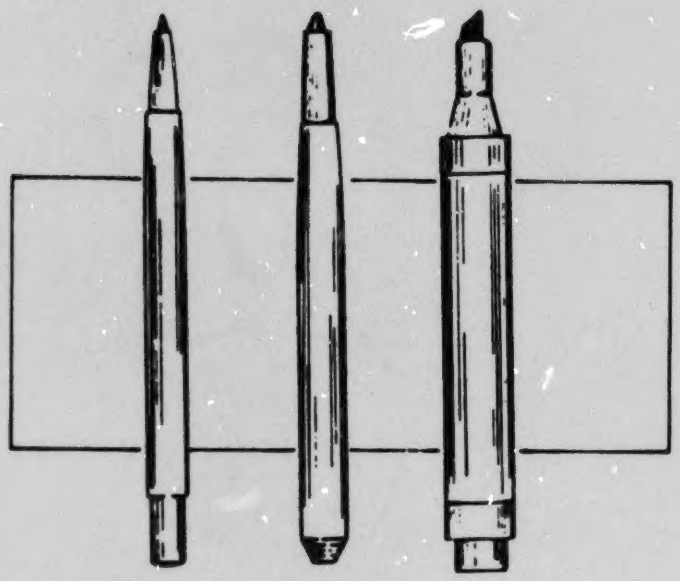
3. The Label Gun (See illustration.):

   a. The label gun is a price marker that places an adhesive-backed price label on merchandise.
   b. It has adjustable bands, and when used with a good supply of ink, produces price marks that are easily read.
   c. It is usually used for price marking soft goods.



4. The Felt Tip Marker (See illustration.):

   a. The felt tip marker is a pen with a felt tip that has an ink supply stored in the handle.
   b. It is used for pricing soft goods and for changing prices.



INSTRUCTION SHEET IV, (page 5)

Some suggestions for price marking include the following:

1. Check the ink supply before marking prices each time you open a carton or case, no matter which price marker is used. A short supply of ink causes dim printing and incomplete price marks; excess ink may cause the price to smear.
2. Check the tips of the marker for cleanliness.
3. Put the price mark on an appropriate place on the merchandise.
4. Place prices on permanent sections of the merchandise container.
5. Some products are pre-priced and need not be price marked.
6. Be organized and avoid skipping around when price marking. This wastes time, and you may forget to mark some items.
7. Make clear, readable price marks on items in locations where they will not be rubbed off.

STUDENT SELF-CHECK III

PROPER PRICE MARKING

Directions: To check your knowledge of proper price marking, answer the following questions on a separate sheet of paper,; then do the exercise which follows. After you have finished, check your answers according to the procedures established by your instructor.

QUESTIONS:

1. The four main things that improper price marking cause are:

   ______________________, ______________________

   ______________________, and ______________________

2. The four kinds of price markers are: ____________, ____________

   ____________, ____________.

3. The marker that is adjustable and used when many items are being stocked.

4. The marker that usually contains prices from 1¢ to 99¢ is the ____.

5. The marker most often used for price marking soft goods is the ____.

EXERCISES:

Using the items, the price list, and the price-marking equipment provided, price mark the following items in the proper way using the proper price marker:

1 carton with one layer of merchandise at 59¢

1 carton with two layers of merchandise at 98¢

1 carton of merchandise in cellophane bags at 77¢

1 carton of one layer of merchandise at $1.98

INSTRUCTION SHEET V

STOCKING SHELVES AND RACKS

Having the right amount of merchandise on the shelves at the right time is essential for maximum sales. When shelves are kept well-stocked and nothing "runs out," sales may increase by 20% or more.

After the cartons have been opened and the items have been price marked they must be transported to the shelves and racks. This can be done in several ways, depending on the quantity and weight of the item being stocked. Among the types of equipment used to transport items to the shelves and racks are a six-wheel truck, a pallet (a wooden frame that must be moved with a jack or forklift), a skid (works like a wheelbarrow with wheels on one end and supports on the other), and a cart.

Before placing the product on the proper shelf, match it by being sure it is the same product, the same brand name, and the same size. The size can be judged one of two ways--check the weight of the product by reading the label or compare the size of the cans or boxes with those already on the shelf.

Always check the items to be certain the prices agree. The price on the merchandise on the shelf should be the same as the price on the merchandise you are about to stock.

Clean the shelves before they are stocked. If they are just dusty, use a cloth to dust them. However, if something has been spilled on them, remove the merchandise already there and wash the shelf with a cleaning agent.

If you are filling a bottom shelf, place the carton on the floor. If you are filling a top or middle shelf and the carton is not too heavy, balance the carton on a shelf near the one you are stocking. Never balance a carton on a cart handle or anything that will topple over. By using both hands to stock, you can get finished much quicker. As you place the items on the shelf, face the labels to the front.

When you empty a carton, you should break it down. This takes up less room on the selling floor and enables you to remove it easier when you are completely finished restocking. These torn down cartons are sometimes called salvage.

As you are stocking, there are some little things that may come up that will need your attention. These include the following:

1. If you find a loose label, repeat it with clear tape.

INSTRUCTION SHEET V, (page 2)

2. If you find some dented and swollen cans or torn boxes and bags, remove them from the selling floor.
3. If you find outdated items, remove them from the selling floor.
4. If you find misplaced items, put them back in their proper place.

After you have completed your stocking job, remove all equipment, leftover cases, and salvage from the selling floor immediately in order not to present a hazardous condition for the customers.

INSTRUCTION SHEET VI

HOW TO SHELVE/STOCK MERCHANDISE ON THE STORE/DEPARTMENT SALES FLOOR

As an employee of a retail establishment, you must know how to shelve/stock merchandise on the store or department display props and fixtures. The following guidelines will help you learn how to do this.

1. Assemble the tools and supplies that you will need to shelve/stock the merchandise.
    a. Box cutter and/or appropriate package opening tools.
    b. Price marker. (In some stores the merchandise will be price marked before it is sent to the sales floor.)
    c. Price tags.
    d. Price list.
    e. Dust cloth/feather duster.
2. Locate the area in the store/department where the merchandise is to be shelved/stocked.
3. Move the merchandise to the display area. Use stock-moving equipment whenever possible:
    a. Two-wheel dolly
    b. Basket dolly
    c. Other
4. If merchandise is hand carried, use the hand carrying method.
5. If shelving/stocking during business hours, avoid placing boxed merchandise in heavily traveled aisles.
6. First remove any older merchandise before stocking the new.
7. Dust or clean the display prop or fixture before shelving/stocking the new merchandise.
8. Using the price list, price mark the new merchandise.
9. Place the new merchandise on the prop or fixture.
10. Check to determine that the merchandise will not fall from the prop or fixture.
11. Turn all containers so that the customers will be able to read the labels.
12. Check the price of the old merchandise to determine that it agrees with the price on the new merchandise. Adjust the price if necessary.

INSTRUCTION SHEET VI, (page 2)

13. Shelve/stock like items of merchandise together.

    a. Stock according to size, and kind. Color may or may not be a stocking factor.

14. When stacking merchandise, avoid placing merchandise in high stacks that will fall.

15. Stack/stock expensive or easily piltered merchandise in lockable props or fixtures. If you are in doubt about the merchandise, check with your department manager.

16. Immediately after shelving/stocking merchandise, clean up and dispose of all packing materials.

17. Return tools and equipment to the appropriate storage area.

STUDENT SELF-CHECK IV

STOCKING SHELVES AND RACKS

Directions: Check your knowledge of stocking merchandise properly by answering the following questions and doing the following exercise. Write your answers on a separate sheet of paper. After you have finished, check your answers according to the procedures established by your instructor.

QUESTIONS:

1. Keeping the shelves and racks properly stocked increases sales by at least what %?
2. What are four types of equipment that amy be used in transporting stock to the sales floor?
3. What three things should be matched before placing the product on the proper shelf?
4. What must you do if the price on the old merchandise does not agree with the price on the new merchandise?
5. Price should agree on what three things?
6. When you empty a case, it should be torn down; what is it called?

EXERCISE:

With the cases of merchandise provided, stock the shelves in your classroom in the proper manner. Your instructor will supervise and check your practice session.

INSTRUCTOR'S FINAL CHECKLIST

STOCKING/SHELVNG MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of stocking/shelving merchandise, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Checked in the merchandise...........	[ ]	[ ]	[ ]	[ ]
b. Opened cases or cartons safely without damaging merchandise................	[ ]	[ ]	[ ]	[ ]
c. Safely transported merchandise to proper location......................	[ ]	[ ]	[ ]	[ ]
d. Price marked each item...............	[ ]	[ ]	[ ]	[ ]
e. Checked shelf allocation............	[ ]	[ ]	[ ]	[ ]
f. Rotated stock........................	[ ]	[ ]	[ ]	[ ]
g. Checked for price agreement with previously stocked items.............	[ ]	[ ]	[ ]	[ ]
h. Cleaned shelves and merchandise......	[ ]	[ ]	[ ]	[ ]
i. Stocked number of items as indicated by shelf allocation..................	[ ]	[ ]	[ ]	[ ]
j. Avoided blocking aisle with equipment and merchandise......................	[ ]	[ ]	[ ]	[ ]
k. Turned all labels toward the front...	[ ]	[ ]	[ ]	[ ]
l. Tore down empty cases................	[ ]	[ ]	[ ]	[ ]
m. Removed all damaged items from shelf................................	[ ]	[ ]	[ ]	[ ]
n. Returned salvage, stock-transporting equipment, damaged merchandise, and price-marking equipment to stock/storage and trash disposal area......	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, STOCKING/SHELVING MERCHANDISE.

Your instructor will provide merchandise, shelves, display cases, and racks. Check in and stock the merchandise.

Module R-19

RETAILING

PREPARING STOCK FOR INVENTORY

INTRODUCTION

As a stock clerk and salesperson in a retail establishment you will be expected to prepare merchandise for inventory. An inventory tells the store manager how much merchandise is on hand; how much merchandise needs to be ordered; how much merchandise is damaged, lost, or stolen, and how much merchandise has been sold. In this module, you will learn how to prepare stock for inventory.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided the necessary supplies, prepare the merchandise for inventory. All applicable items on the Instructor's Final Checklist should be performed.

(2) Provided merchandise, an inventory recording form, and a calculator, inventory the merchandise. All entries on the inventory recording form should be legible; all merchandise should be correctly counted; and all mathematical computations should be correct.

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LEARNING ACTIVITIES

1. READ about how to prepare merchandise for inventory. Your instructor will provide a reference.

   (or) ____

2. READ Instruction Sheet I, PREPARING STOCK FOR INVENTORY.

   (or) ____

3. LISTEN and OBSERVE as your instructor discusses and demonstrates how to prepare merchandise for physical inventory.

4. CHECK YOUR KNOWLEDGE of preparing merchandise for inventory by taking Student Self-Check I, WHY RETAILERS TAKE INVENTORY.

5. CHECK YOUR KNOWLEDGE of preparing merchandise for inventory by taking student Self-Check II, PREPARING STOCK FOR INVENTORY.

6. PRACTICE preparing for physical inventory by arranging the merchandise provided by your instructor for physical inventory.

7. READ about how to take a physical inventory. Your instructor will provide a reference.

   (or) ____

8. LISTEN and OBSERVE as your instructor discusses and demonstrates how to take a physical inventory.

9. CHECK YOUR KNOWLEDGE of the advantages and disadvantages of inventory methods by taking Student Self-Check III, THE ADVANTAGES AND DISADVANTAGES OF INVENTORY METHODS.

10. READ Instruction Sheet II, INVENTORY PROCEDURES.

    (or) ____

11. CHECK YOUR KNOWLEDGE of inventory procedures by taking Student Self-Check IV, INVENTORY PROCEDURES.

12. READ Instruction Sheet III, HELPFUL HINTS FOR TAKING INVENTORY.

    (or) ____

13. PRACTICE taking a physical inventory in the learning laboratory. Your instructor will provide merchandise and an inventory sheet.

14. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

PREPARING STOCK FOR INVENTORY

As a stock clerk or salesperson in a retail establishment, you will be expected to prepare merchandise for physical inventory. Physical inventory is simply a count of the merchandise that a retailer has on hand at a specific time. Counting the merchandise tells the manager:

--How much merchandise is on hand at a specific time.

--How much merchandise needs to be ordered to meet the needs of the customers.

--How much merchandise has been sold during a specific period of time.

--How much merchandise on hand is damaged or out of style.

--How much merchandise has been pilfered or lost.

--How much money is invested in total merchandise when the inventory is taken.

--What merchandise is overstocked.

As a stock clerk you usually will be expected to prepare merchandise that is stored in the warehouse or stock room for inventory. If you are a salesperson, you will usually be asked to prepare merchandise that is on the sales floor for inventory. Each retailer will have his/her own method for preparing merchandise for inventory and you will have to follow the procedures. When you are performing this task of preparing for inventory (counting), you will:

1. Arrange stock so that all items can be easily counted.

   a. Group identical items.
   b. Write the number of items on each sealed carton before it is placed in storage. Face the carton so that it can be easily read.
   c. Count the number of items in open cartons and write this number on the surface of the carton that faces outward. Seal the carton with tape.
   d. Arrange and stack merchandise so that the inventory team can visually count it.
   e. Palletized merchandise should also be arranged in this manner. Some retailers will ask you to tag the merchandise with what is called a pre-count number.

INSTRUCTION SHEET I, (page 2)

f. Collect all single or loose items of merchandise and place them where they normally belong. Some retailers elect to tag this merchandise with a stock number and a pre-count. This procedure is usually followed on the sales floor also.

2. Carefully make a final inspection of the stocked merchandise to determine that all items have been counted, tagged, and located where it will be counted by the inventory team.

3. As you count or arrange the merchandise for inventory, inspect it for damage, soilage, or for being out of style. Write notes concerning any merchandise that should be reduced for clearance or moved out of storage first. Give this information to your supervisor.

If you are preparing merchandise for inventory on the sales floor, you will basically follow these same procedures. You will, of course, have very few closed or sealed cartons of merchandise. Be certain to include items stored in drawers that are under display props.

STUDENT SELF-CHECK I

WHY RETAILERS TAKE INVENTORY

Directions: Listed below are reasons why retailers take physical inventory. Some of these reasons are false; some are true. On a separate sheet of paper, number from 1 to 8. Place a plus (+) if the statement is true and a minus (-) sign if the statement is not true. When you have finished, check your answers according to the procedures established by your instrucotr.

1. Retailers take physical inventory so that the salespeople and stock clerks will be trim and fit.
2. Retailers take physical inventory so that they can collect information concerning how much merchandise has been sold within a specific amount of time.
3. Retailers take physical inventory to collect information concerning damaged, soiled, and out-dated merchandise.
4. Retailers take physical inventory to collect information concerning how much money they have invested in current stock.
5. Retailers take physical inventory to collect information concerning over-stocked merchandise.
6. Retailers take physical inventory to collect information about their personal health.
7. Retailers take physical inventory to collect information about how much money they have made during a specific time period.
8. Retailers take physical inventory to determine what items of merchandise need to be ordered to meet the needs of their customers.

STUDENT SELF-CHECK II

PREPARING STOCK FOR INVENTORY

Directions: You have learned that there are generally accepted methods used by retailers for preparing stock for physical inventory. Read the following statements and on a separate sheet of paper list those that describe how a salesperson or a stock clerk prepares merchandise for physical inventory. When you have finished, check your answers according to the procedures established by your instructor.

1. Write the number of items in sealed boxes on the outside of each carton and face the numbered side of the carton so that it can be easily read by the inventory team.
2. Group identical items together.
3. Count the number of items in open containers and write this number on the outside of the container and seal it.
4. Collect all single items of merchandise and place them where they normally belong.
5. Inspect merchandise to determine that it is not damaged, soiled, or out of style.
6. Make a final inspection to determine that all merchandise has been counted, tagged, and located where the inventory team will include it in the inventory.
7. Avoid including merchandise in the inventory preparation that is stored in the drawers located under the display props on the sales floor.

STUDENT SELF-CHECK III

THE ADVANTAGES AND DISADVANTAGES OF INVENTORY METHODS

Directions: Number a sheet of paper from 1 to 10. If the statement is true, write a T. If the answer is false, write an F. When you have finished, check your answers according to the procedure established by your instructor.

1. There is only one method of inventory.
2. Physical inventory is known as book inventory.
3. Perpetual inventory is a count of merchandise that is updated regularly on stock record cards or on computers.
4. Computers are being used by retailers to store inventory information.
5. An advantage of physical inventory is its accuracy of inventory on a specific date.
6. A disadvantage of physical inventory is its inability to show shortages of merchandise from shoplifting.
7. An advantage of perpetual inventory is that stock record cards can be updated frequently.
8. A disadvantage of perpetual inventory is that it provides details about inventory only on a specific date.
9. A retailer should use the type of inventory that gives him/her the necessary information.
10. A computer keeps the retailer informed about stock conditions.

INSTRUCTION SHEET II

INVENTORY PROCEDURES

Before an actual count of merchandise can be taken, preparation for the inventory is important in a retail store. The preparation of inventory procedures covers the planning, counting, and recording of the merchandise on hand and the calculation of the stock.

When the department buyer is planning to take inventory, he/she does the following:

1. Divides and groups merchandise according to type, style, and price.
2. Changes prices to current market price.
3. Checks price tickets to see if the necessary information is on the price tickets.
4. Plans a sale to reduce stock and to move any undesirable merchandise.
5. Makes a layout chart of the department, showing the location of the merchandise.
6. Gets the necessary inventory sheets.
7. Gives instructions to the salespeople.

STUDENT SELF-CHECK IV

INVENTORY PROCEDURES

Directions: On a separate sheet of paper, number the following inventory procedures according to the way the department buyer would do them. When you have finished, check your answers according to the procedures established by your instructor.

1. Gives instructions to the salespeople.
2. Divides and groups merchandise according to type, style, and price.
3. Plans a sale to reduce stock and to move any undesirable merchandise.
4. Gets the necessary inventory sheets.
5. Makes a layout chart of the department.
6. Checks price tickets to see if the necessary information is on the price tickets.
7. Changes prices to current market price.

INSTRUCTION SHEET III

HELPFUL HINTS FOR TAKING INVENTORY

The following steps are those used by some retailers to take physical inventory:

1. Get a master inventory list from the department buyer.
2. Get a layout chart of the department from the department buyer.
3. Get an inventory sheet. (Refer to Inventory Sheet on next page.)
4. Fill in the Date, Fixture Number, Department Name, Counted By, Entered By, and Checked By.
5. Moving from left to right and from top to bottom count each item of merchandise and enter the count in the Quantity column on the inventory sheet.
6. Using the price ticket, fill in the necessary information on the inventory sheet: Stock Number, Description, Season Code, Unit, and Unit Price.
7. Write on the inventory sheet the count for sealed boxes that is printed on the box.
8. Multiply the Quantity by the Unit Price.
9. Put total price on the inventory sheet under the Total Price column for each item.
10. Add the Total Price column, and put your answer on the inventory sheet where it says Total.
11. Give the inventory sheet to the person whose name is listed on the line Checked By.

INSTRUCTION SHEET III, (page 2)

INVENTORY SHEET

Date: ______________ Fixture No.: ____________

Department Name: ____ Department No.: __________

Counted By: ____________________________ Entered By: ______________________________

Checked By: ____________________________

Stock Number	Description	Season Code	Quantity	Unit	Unit Price	Total Price

TOTAL __________

INSTRUCTION SHEET III, (page 3)

Listed below are some helpful hints for you to follow:

1. Make sure that merchandise is arranged according to the way that it should be written on the inventory sheet.
2. If you make a mistake, draw a line through it.
3. If the item is the same as the line above, draw a wavy line in the description column.
4. When you are recording Season Code, Quantity, Unit, and Unit Price, do not leave any spaces blank.
5. Write carefully and clearly.
6. Multiply the Quantity by the Unit Price accurately.
7. Write total Price accurately and clearly.
8. Add the total price column accurately.
9. Write total accurately and clearly.

INSTRUCTOR'S FINAL CHECKLIST

PREPARING STOCK FOR INVENTORY

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) In the process of preparing stock (merchandise) for inventory, the student:				
a. Grouped identical items	[ ]	[ ]	[ ]	[ ]
b. Wrote the number of items in sealed cartons on the cartons	[ ]	[ ]	[ ]	[ ]
c. Counted the number of items in opened cartons and wrote the number on the cartons	[ ]	[ ]	[ ]	[ ]
d. Sealed the opened cartons	[ ]	[ ]	[ ]	[ ]
e. Checked to determine that all items had been pre-counted	[ ]	[ ]	[ ]	[ ]
(2) When taking inventory, the student:				
a. Counted all merchandise	[ ]	[ ]	[ ]	[ ]
b. Completed inventory sheet	[ ]	[ ]	[ ]	[ ]
(1) Filled out the top part of the inventory sheet	[ ]	[ ]	[ ]	[ ]
(2) Filled in stock number, description, season code, quantity, unit, and unit price for each item	[ ]	[ ]	[ ]	[ ]
(3) Multiplied quantity times unit price accurately for each item	[ ]	[ ]	[ ]	[ ]
(4) Added total price accurately	[ ]	[ ]	[ ]	[ ]
(5) Wrote legibly	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explains the activities you must be able to complete in order to finish this module. As you go through the activities, your instructor will rate your performance using the Instructor's Final Checklist, PREPARING STOCK FOR INVENTORY.

(1) Your instructor will provide you with the necessary supplies and merchandise. Prepare the merchandise for inventory.

(2) Your instructor will provide you merchandise and an inventory recording form. Inventory the merchandise.

RETAILING

MAINTAINING INVENTORY CONTROL SYSTEMS

INTRODUCTION

If a retail establishment is to adequately serve its customers needs, it must maintain an adequate supply of merchandise from which the customers can buy. This supply of merchandise is referred to as the store's inventory. In this module, you will learn how retailers maintain an adequate supply of merchandise (inventory) by efficiently maintaining an inventory control system. As a future employee of a retail establishment, you must know how and be able to assist in maintaining the inventory control system that is used by your store.

DIRECTIONS

Read the objective below. If you think that you are all ready able to perform the task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a list of inventory control activities that are performed by retail salespeople and receiving clerks identify the ones that each performs. Each activity must be correctly identified.

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LEARNING ACTIVITIES

---

1. READ about the importance of inventory control systems. Your instructor will provide a reference.

   (or) ______________________________

2. LISTEN as your instructor discusses inventory control methods and the procedures for maintaining inventory control.

   (or) ______________________________

3. READ Instruction Sheet I, A LOOK AT INVENTORY CONTROL SYSTEMS.

   (or) ______________________________

4. READ Instruction Sheet II, METHODS OF INVENTORY CONTROL.

   (or) ______________________________

5. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, METHODS OF INVENTORY CONTROL.

6. LISTEN and OBSERVE as your instructor discusses and demonstrates how to maintain stock record cards.

   (or) ______________________________

7. READ Instruction Sheet III, STOCK RECORD CARD.

   (or) ______________________________

8. CHECK YOUR KNOWLEDGE by completing Student Self-Check II, STOCK RECORD CARDS.

9. READ Instruction Sheet IV, STARTING A PERPETUAL INVENTORY SYSTEM.

   (or) ______________________________

10. CHECK YOUR KNOWLEDGE by completing Student Self-Check III, STARTING A PERPETUAL INVENTORY SYSTEM.

11. READ Instruction Sheet V, WHAT RETAIL EMPLOYEES DO TO HELP MAINTAIN A PERPETUAL INVENTORY CONTROL SYSTEM.

    (or) ______________________________

12. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

A LOOK AT INVENTORY CONTROL SYSTEMS

The largest dollar investment that retailers have is their inventory which is the merchandise that they purchase to sell to their customers. If the retailer is to protect this large investment a method must be used to describe how much is on hand, how much as been ordered, the value of merchandise purchased and how much has been sold. So that the retailer will have this information available a record keeping system called INVENTORY CONTROL is set up.

To maintain efficient control of inventory retailers use either one or a combination of the following two methods.

1. A physical inventory which is an actual count of merchandise on hand at a particular time

2. A perpetual inventory which is a count of merchandise that is regularly updated from information collected from purchase orders receiving documents, sales and returns.

If the retailer has an efficient inventory control system set up the following information can be obtained from it.

1. Dollars invested in inventory.

2. Data concerning what merchandise sells and does not sell.

3. Stock level of merchandise at any specified date.

4. What items need to be reordered to maintain an adequate on hand supply.

5. Data concerning what items need to be used for sales promotions.

6. Information to simplify the ordering of merchandise.

With the introduction of the computer as an inventory control aid retailers have been able to better maintain control of their merchandise and they have also been able to better maintain "perpetual inventories." Before the introduction of computers, perpetual inventories were and are still maintained on stock record cards which require the entering of the following information by hand: 1) purchases made, 2) merchandise sold and 3) merchandise returned by customers. Also, before a perpetual inventory is set up the retailer has to take a physical inventory.

In summary, an inventory control system is set up by retailers for the purposes of:

1. Maintaining an adequate supply of merchandise to serve the needs of customers.

INSTRUCTION SHEET I, (page 2)

2. Protecting the supply of merchandise from shrinkage.
3. Helping the retailer acquire knowledge of what merchandise is selling and what merchandise is not selling.

INSTRUCTION SHEET II

METHODS OF INVENTORY CONTROL

The two methods of stock control or inventory control are: (1) dollar-control method, and (2) unit-control method. In the dollar-control method, the retailer takes a physical inventory at frequent intervals, calculates his/her book inventory or perpetual inventory, and checks the physical inventory against the planned stock or inventory figures. In the dollar-control method, inventory is expressed in dollars. The dollar-control method tells the retailer whether his/her stock is too high or too low in relation to the planned stock or inventory figure. This method does not tell the retailer any specific information about items that are in stock, out of stock, or slow-selling.

In the unit-control method, a retailer records his/her stock by units of merchandise on stock record cards for each item of merchandise. The unit-control method provides the retailer essential information. This method provides the following information: (1) when items are needed, (2) when items are slow-selling, (3) when stocks or inventory are well-balanced, and (4) when items out of stock will affect sales.

STUDENT SELF-CHECK I

METHODS OF INVENTORY CONTROL

Directions: Select the letter of the best response. Write your answers on a separate sheet of paper. Check your answers according to the procedure established by your instructor.

1. A systematic plan for recording and reporting types and quantities of merchandise on hand and on order is known as: (a) inventory control, (b) dollar-control method, (c) unit-control method, (d) purchase requisition.

2. When a retailer records merchandise by units on stock record cards, he/she is using: (a) inventory control, (b) a dollar-control method, (c) a unit-control method, or (d) security control

3. When a retailer takes a physical inventory, calculates his/her perpetual inventory, and checks the physical inventory against the planned inventory figure, he/she is using: (a) security control, (b) dollar-control method, (c) unit-control method.

4. Which one expresses inventory in dollars? (a) security control, (b) dollar-control method, (c) unit-control, or (d) inventory control method.

5. Which one expresses inventory in units? (a) stock control, (b) dollar-control method, (c) unit-control method, or (d) inventory control method.

Directions: Read the following statements. If the statement is true, place a T on your paper; if the statement is false, place a F on your paper. Check your answers according to the procedure established by your instructor.

1. Sheet of paper control helps management to keep the proper inventory level of merchandise.

2. Stock must be checked frequently and accurately.

3. Inventory control will simplify the ordering of merchandise.

4. The unit-control method tells the retailer whether his/her inventory is too high or too low.

5. The dollar-control method tells the retailer when items are needed.

INSTRUCTION SHEET III

THE STOCK RECORD CARD PERPETUAL INVENTORY CONTROL SYSTEM

In some unit-control systems, a stock record card is kept on each item of merchandise and is recorded on the card by units and not by dollars. Given below is an example and explanation of data that is recorded on a stock record card.

Item--the name of the merchandise.

Stock Number--the supplier's number of the merchandise.

Minimum--the minimum number of units to be kept in stock.

Maximum--the maximum number of units to be kept in stock.

Date--the date that information is recorded on the card.

Beginning Inventory--the number of units in stock when a physical inventory is taken.

Purchases--the number of units on purchase orders from suppliers.

Purchases On Back Order--the number of units on order from suppliers that will be received at a later date.

Sales--the number of units that have been sold.

On Hand--the number of units that are in stock on any given date.

The stock record cards are used for perpetual inventory or book inventory. This perpetual inventory or book inventory provides the retailer information about the condition of his/her stock at any time. These cards are maintained by retail employees who have the job title "stock record clerks."

Stock record cards should be kept accurately and neatly. Even though extreme care is used in keeping the stock record cards, errors will occur. The errors will not be seen until an actual physical inventory is taken. The actual physical inventory will show a true condition of the stock, and the stock record cards will have to be corrected. If the physical inventory shows more in stock than the stock record card shows, this is known as overage. If the physical inventory shows less in stock than the stock record card shows, this is known as shortage.

Stock record cards as a tool for maintaining perpetual inventory control systems are being replaced by computerized inventory control systems and the job title "stock record clerk" is being replaced by the job title" item control person," "data processing control person," and "stock control person."

STUDENT SELF-CHECK II

STOCK RECORD CARDS

Directions: Match the terms to their definitions. Write your answers on another sheet of paper. Check your answers according to the procedures established by your instructor.

A. item
B. stock number
C. maximum
D. minimum
E. date
F. beg. inv.
G. purchases
H. purchases on back order
I. sales
J. on hand

_____ 1. The number of units that are in stock on any given date.

_____ 2. The name of the merchandise.

_____ 3. The date that information is recorded on the card.

_____ 4. The number of units that have been sold.

_____ 5. The supplier's number of the merchandise item.

_____ 6. The number of units in stock when a physical inventory is taken.

_____ 7. The maximum number of units to be kept in stock.

_____ 8. The number of units on order from suppliers that will be received at a later date.

_____ 9. The minimum number of units to be kept in stock.

_____ 10. The number of units on purchase orders from suppliers.

INSTRUCTION SHEET IV

STARTING A PERPETUAL INVENTORY SYSTEM

When starting a perpetual inventory system, you must always begin with a physical inventory of merchandise in stock. The units obtained from a physical inventory are recorded on the stock record cards under beginning inventory. Next, you obtain copies of the purchase orders. The units on order are recorded on the stock record cards under purchases. You obtain copies of the invoices to find out whether the merchandise that was ordered was received. You compare the units received to the units that were ordered. If there is a difference between what was ordered and what was received, you must adjust the stock record card either up or down according to what was recorded under the purchase section of the stock record card. If the invoice shows merchandise that was placed on back order, you record the number of units on the stock record card under purchases on back order.

Next, you obtain records that show what merchandise has been sold. Examples of records that show what merchandise has been sold are sales checks, price tickets, reserve requisitons, and cash register tapes. When recording the number of units that have been sold, you record it under sales on the stock record card.

> Sales checks are prepared in duplicate for every sale. The duplicate copy is used to record the information on the stock record card.
>
> Price tickets are used that have two parts. One part is torn off the price ticket to record information on the stock record card, and the other part is left on the item for the customer.
>
> Reserve requisitions are used when individual sales are not recorded. The units of individual items are requisitioned from reserve stock for the selling floor. The units are subtracted on the stock record cards as if the items have been sold.
>
> Cash register tapes are used to record information when a sale is made on a cash register. The sales are recorded in duplicate. One copy is given to the customer, and the other copy is used to record information on stock record cards.

You obtain copies of credit slips that have been issued to customers for merchandise that has been returned. The units of returned merchandise is subtracted from sales on the stock record cards, and you should show a reason for the subtraction.

STUDENT SELF-CHECK III

STARTING A PERPETUAL INVENTORY SYSTEM

Directions: Number the following items in the order according to the way they should be done when you are starting a perpetual inventory system. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

1. Take a physical inventory.
2. Obtain credit slips.
3. Obtain copies of purchase orders.
4. Obtain copies of sales records.
5. Obtain copies of invoices.

INSTRUCTION SHEET V

WHAT RETAIL EMPLOYEES DO TO HELP MAINTAIN A PERPETUAL INVENTORY CONTROL SYSTEM

In module R-19 you learned that retailers do take a physical inventory and you learned that you will be asked to help prepare for and to take the inventory. You will also be asked to help maintain a perpetual inventory control system by doing some of the following activities.

The Receiving Clerk

As a receiving clerk you will:

1. Check in merchandise at the receiving area, and forward copies of receiving documents to the store employees who maintain the perpetual inventory control system. These store employees are often referred to as stock record clerks.
2. Send copies of shipping documents (out-going) to the stock record clerks so that the out-going merchandise can be taken out of the inventory control system.
3. Send copies of physical inventory documents to the stock record clerks so that they can make adjustments to the stock inventory control system.

As a salesperson in a retail establishment your responsibilities in helping maintain your stores perpetual inventory control system will be to:

1. Report accurate information on each sales transaction so that the merchandise sold can be taken out of the inventory control system.
2. Record accurate information on each item of merchandise returned by customers so that the data can be recorded in the inventory control system
3. Record accurate physical inventory information so that it can be used for adjusting the perpetual inventory control system.
4. Record accurate data concerning any merchandise that is removed from the sales floor for such reasons as: merchandise soiled and unfit for selling or merchandise damaged and unfit for selling.
5. If the retailer where you work has a computerized perpetual inventory system that is controlled by cash register terminals, you will be expected to ring up each sales transaction accurately, including all data that is required for maintaining the perpetual inventory control system.
   --Stock number of merchandise
   --Quantity purchased
   --Unit price

INSTRUCTION SHEET V, (page 2)

If the retailer where you work has an optical cathodray terminal (scanner) system you have only to properly use the wand or roll over window and the basic data will be entered on the perpetual inventory system.

6. If you remove merchandise from your department's sales floor to be transferred to another store within the corporation or you remove merchandise for other reasons that will reduce your stores inventory you must report this data on the appropriate forms and forward the inventory copy to the stock control clerk.

   If a perpetual inventory control system is to be effective and maintained accurately each retail store employee must perform their appointed data responsibilities accurately.

INSTRUCTOR'S FINAL CHECKLIST

MAINTAINING INVENTORY CONTROL SYSTEMS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
When identifying the inventory control activities the student: correctly identified the retail employee(s) who performed it	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, MAINTAINING INVENTORY CONTROL SYSTEMS.

Given a list of inventory control activities that are performed by retail salespeople and receiving clerks, identify the ones that each performs. Each activity must be correctly identified.

RETAILING

PREPARING GOODS FOR RETURN TO VENDOR

INTRODUCTION

Retailers find that they must, for varied reasons, return merchandise to their vendors. For example, the retailer may order an item of merchandise and the vendor sends an unsuitable substitute. As a stockperson, receiving clerk, or salesperson, you may be requested to prepare the merchandise for shipment. In this module, you will learn how to prepare merchandise for return to the vendor.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity inside this module and go through them in the order in which they are listed.

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided merchandise, address label, packing filler, vendor address, charge-back forms/memorandum invoice, container, wrapping materials, shipping forms, and scales, prepare merchandise for return to vendor. The merchandise must be packed to insure safe arrival and be securely wrapped. Labeling must indicate method of shipment and complete address of sender and receiver.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about returning merchandise to vendors. Your instructor will provide a reference.

   (or)______________________________

2. COMPLETE Student Self-Check I, RETURNS TO VENDORS.

3. COMPLETE Student Self-Check II, VENDOR RETURN FORMS.

4. READ Instruction Sheet I, RETURNING MERCHANDISE TO VENDORS.

   (or)______________________________

5. COMPLETE Student Self-Check III, RETURNING MERCHANDISE TO VENDORS.

6. LISTEN and OBSERVE as your instructor discusses and demonstrates how to "Prepare Merchandise for Shipping."

7. READ Instruction Sheet II, PREPARING MERCHANDISE FOR SHIPPING.

   (or)______________________________

8. PRACTICE packing, wrapping, and addressing packages for vendor send back, in the learning lab.

9. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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STUDENT SELF-CHECK I

RETURNS TO VENDORS

Directions: Write your answers on a separate sheet of paper. If the statement is true, write a T; if the statement is false, write an F. Check your answers according to the procedures established by your instructor.

1. Goods may be returned to vendors if they are not delivered in a specified time.
2. Defective merchandise is not returnable.
3. Merchandise received, but not ordered, can be returned.
4. The retailer should notify the vendor of any merchandise to be returned.
5. Any merchandise ordered is always legitimately returnable.
6. Returning merchandise to vendors for reasons that are not attributable to the vendor should not be done.
7. Merchandise that is received on consignment is returnable to the vendor.
8. The vendor always pays postage and packing for all repair returns.

STUDENT SELF-CHECK II

VENDOR RETURN FORMS

Directions: On a separate sheet of paper, number from 1-6. If the statement is true, write a T; if the statement is false, write an F. Check your answers according to the procedures established by your instructor.

1. Most stores have a special form for listing returns to vendors.
2. A packing slip, (a copy of the charge-back), should be enclosed with the shipment.
3. Invoices should not be sent.
4. Returns are usually packed and shipped by the person or persons who receive and check incoming merchandise.
5. Most stores have address labels with wire fasteners when gummed labels are unworkable.
6. The proper name for the form sent with returned merchandise is a charge-back.

INSTRUCTION SHEET I

RETURNING MERCHANDISE TO VENDORS

Retailers may find it necessary to return merchandise to their vendors. This situation arises for varied reasons. Some of the reasons are:

--The retailer ordered specific items of merchandise and the vendor made substitutes that were unacceptable.

--The retailer received damaged merchandise due to poor packaging.

--The retailer received merchandise too late for the selling season.

--The retailer received merchandise that was of inferior quality.

--The retailer received merchandise that was the wrong color, size, or style.

As a receiving clerk, a stock clerk, or salesperson, you may be asked to prepare the merchandise for return to the vendor. You will be faced with one of two kinds of preparation: (1) the merchandise may still be in its original package unopened, or (2) the merchandise may be without a box and may need to be packaged. If the merchandise is still in its original shipping container and the container is sealed, you should:

1. Follow your store's policy.

2. Prepare the merchandise for return only after authority to return the items has been received by the store manager or buyer from the vendor.

3. Write a charge-back form that tells the vendor about merchandise that is being returned. The charge-back form must include the following information:

    a. Date merchandise was received by the store.
    b. Date merchandise is to be shipped.
    c. Style number of merchandise.
    d. Description of the merchandise being returned.
    e. Reason(s) the merchandise is being returned.
    f. Class of merchandise being returned.
    g. Number of merchandise being returned.
    h. Unit cost of each item being returned.
    i. Total cost of each item being returned.
    j. Carrier that will ship the merchandise.
    k. Cost of the shipping charges.

INSTRUCTION SHEET I, (page 2)

If the merchandise is still in the original shipping containers and the containers are still completely taped and sealed:

a. Weigh the package and record the shipping cost on the proper form after consulting the shipping rate book.
b. Fill out an address label including both the full address of the vendor and the return address of your store.
c. Remove or completely mark through any other shipping labels that are on the container.
d. Mark out any other freight charges that are on the container.
e. Attach the shipping label securely to the container.
f. Place the container in the designated area to be picked up by the carrier for return to the vendor.

If the merchandise has been unpacked, you should follow the same procedures; however, you will have to do some additional activities:

1. After receiving the vendor's permission to return the merchandise, complete the charge-back form.
2. Count the merchandise to be returned.
3. Choose a container that will hold the merchandise without damaging it.
4. Pack the container with the merchandise.
5. Place a copy of the charge-back form in the container on top of the merchandise.
6. Close the container and seal it neatly and tightly.
7. Weigh the container.
8. Calculate the cost of shipping.
9. Fill out a mailing label including the complete address of the vendor and your store's return address.
10. Securely attach the mailing label to the shipping container.

STUDENT SELF-CHECK III

RETURNING MERCHANDISE TO VENDORS

Directions: Number a separate sheet of paper from 1 to 8. If the statement is true, place a T beside the number. If the statement is false, place an F beside the number. Check your answers according to the procedures established by your instructor.

1. Any situation which could cause an item to be returned should be prevented.
2. Merchandise must be prepared very carefully.
3. Merchandise should be counted before being packed.
4. A charge-back should not be prepared with returned merchandise.
5. Merchandise should be packed so damage will not occur in shipment.
6. All packages should be properly addressed with both the vendor's and sender's addresses.
7. Packages should not be secured with tape or twine.
8. Packages should be weighed before shipping for postage purposes.

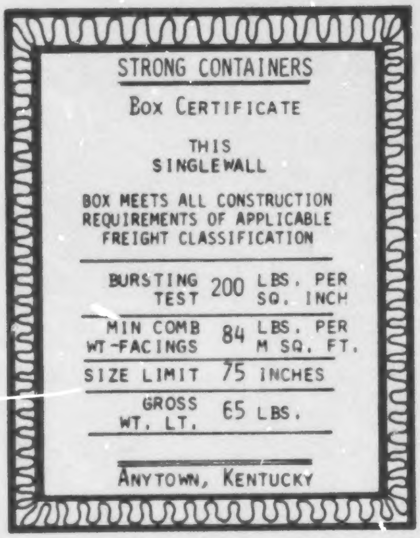
INSTRUCTION SHEET II

PREPARING MERCHANDISE FOR SHIPPING

You have learned that each retailer will have specific policies about how to return merchandise to vendors. You have learned that there are forms that must be completed to accompany the shipment. Now you are ready to learn how to package the merchandise so that the carrier will accept it for return to the vendor and so that the merchandise will not be damaged during shipment.

When you are requested to prepare merchandise for return to vendors, follow your store's procedures. Some generally accepted guidelines that you can follow are:

1. If the merchandise to be shipped weighs 50 pounds or, less put it in a good, rigid carton that has all of its flaps intact. New cartons are best; however, used ones that are in good rigid condition can be used. When choosing a carton, be certain that the one you choose is built to hold the weight of the merchandise. If you are in doubt, look for the manufacturer's box certificate and check the gross weight limit.



STRONG CONTAINERS

Box Certificate

THIS
SINGLEWALL

BOX MEETS ALL CONSTRUCTION
REQUIREMENTS OF APPLICABLE
FREIGHT CLASSIFICATION

BURSTING TEST	200	LBS. PER SQ. INCH
MIN COMB WT-FACINGS	84	LBS. PER M SQ. FT.
SIZE LIMIT	75	INCHES
GROSS WT. LT.	65	LBS.

Anytown, Kentucky

2. Carefully cushion the merchandise with packing material such as newspaper, styrofoam packing material, or crumpled paper bags. This is done by:

    a. Placing cushioning material in the bottom of the box.
    b. Wrapping each item separately.
    c. Placing items on the cushioning material in the center of the box. Leave space between each item.
    d. Packing cushioning material around and over items.

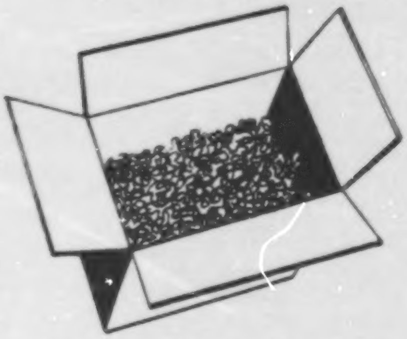
INSTRUCTION SHEET II, (page 2)

3. Keeping fragile items away from corners and sides of carton.
4. Placing a duplicate label inside the carton.
5. Securely closing the carton using three inch reinforced craft paper tape, two-inch pressure sensitive carton sealing tape, pressure sensitive filament tape, or kraft paper tape.
6. Labeling the carton including the receiver's complete name, address, city, state, and zip code.
7. Placing the label on top of the carton. Avoid placing the label on a seam or tape.
8. Removing or crossing out old addresses.
9. Including your complete address on the label.

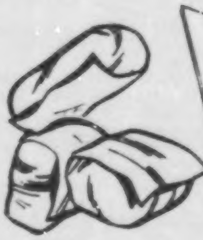
PACKAGING

(AS RECOMMENDED BY THE POSTAL MANUAL)

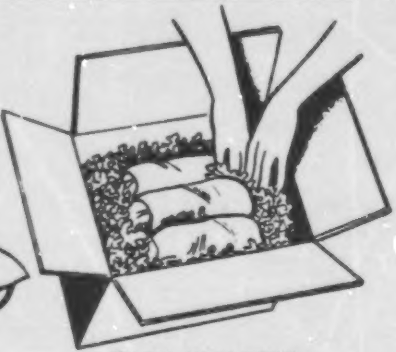
·ODD SHAPED ARTICLES:



PACK CUSHIONING MATERIAL IN BOTTOM OF CARTON.

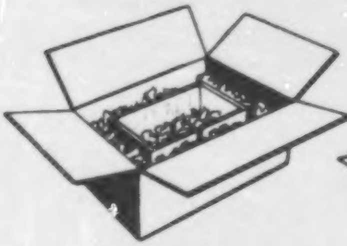


WRAP EACH ITEM SEPARATELY.

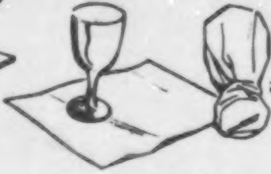


PACK WRAPPED ITEMS IN CENTER OF CARTON And PACK MATERIAL AROUND And OVER.

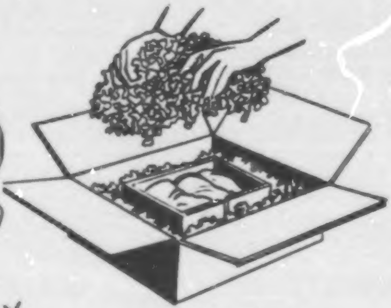
·FRAGILE ARTICLES



PLACE PACKING MATERIAL IN BOTTOM OF CARTON. PLACE INSERT IN CENTER OF PACKING.



WRAP EACH ITEM SEPARATELY.

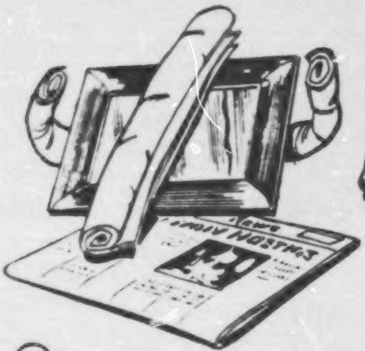


PLACE IN INSERT And COVER WITH PACKING MATERIAL.

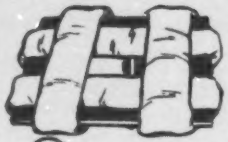
Courtesy U.S. Postal Service

PACKAGING
(AS RECOMMENDED BY THE POSTAL MANUAL)

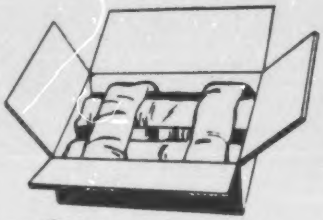
FRAMED PICTURES:



① FORM ROLLS FROM NEWSPAPER.

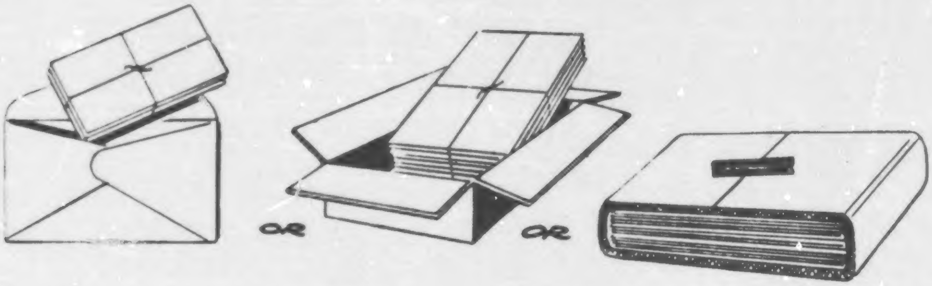


② WRAP SECURELY AROUND FRAME.



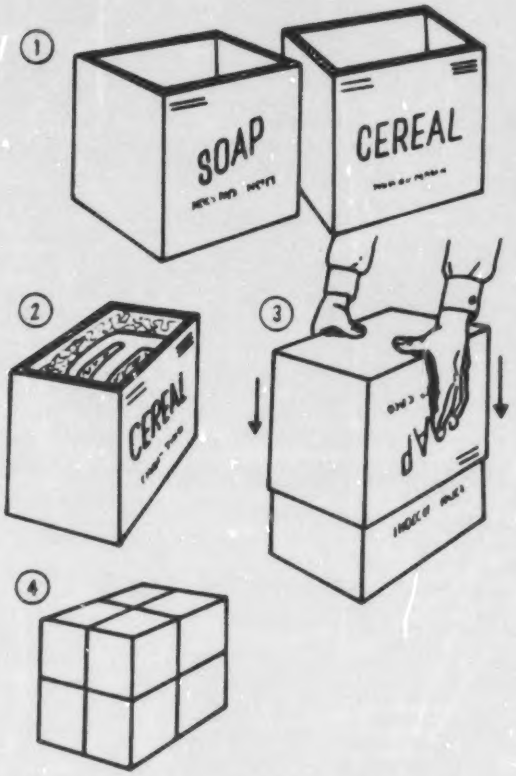
③ PACK SECURELY IN CARTON.

PAMPHLETS, FORMS, PAPERS, ETC.



Courtesy U.S. Postal Service

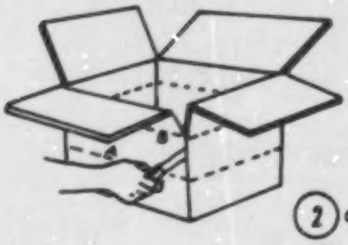
REUSING CARTONS FOR MAILING
(AS RECOMMENDED BY THE POSTAL MANUAL)


①
SOAP
CEREAL
②
CEREAL
③
SOAP
④

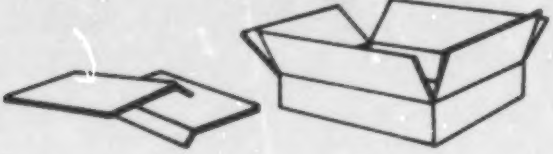
Courtesy U.S. Postal Service

REUSING CARTONS FOR MAILING
(AS RECOMMENDED BY THE POSTAL MANUAL)

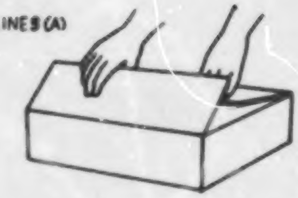
① MARK DESIRED HEIGHT OF BOX (A). DETERMINE SIZE OF TOP FLAPS AND MAKE SECOND LINE (B). SPLIT CORNERS TO (A).



② CUT ALONG LINE (B).



③ FOLD ALONG LINES (A)

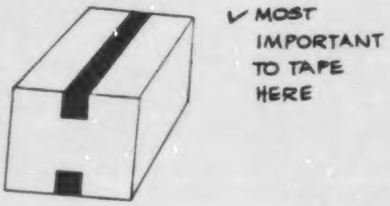


Courtesy U.S. Postal Service

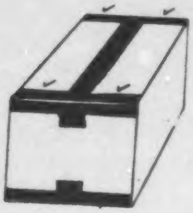
WRAPPING--REINFORCING CLOSURES

(FASTENING DOWN PACKAGE FLAPS WITH TAPE & STAPLES AS RECOMMENDED BY THE POSTAL MANUAL)

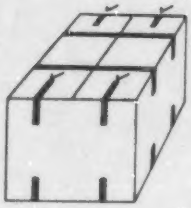
- APPLYING ONE-THICKNESS PAPER TAPE:


✓ MOST IMPORTANT TO TAPE HERE

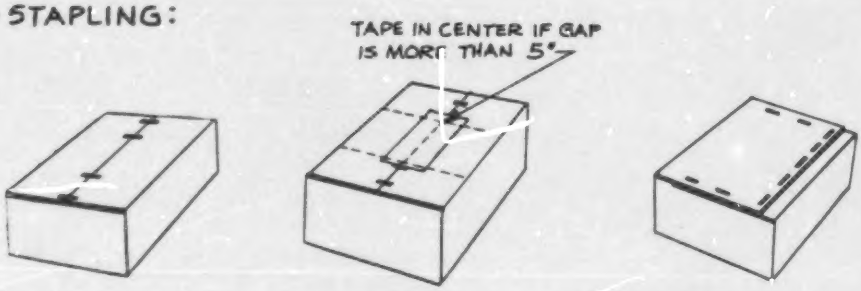
- USING REINFORCED PAPER TAPE:



- USING PRESSURE-SENSITIVE FILAMENT TAPE:



- STAPLING:

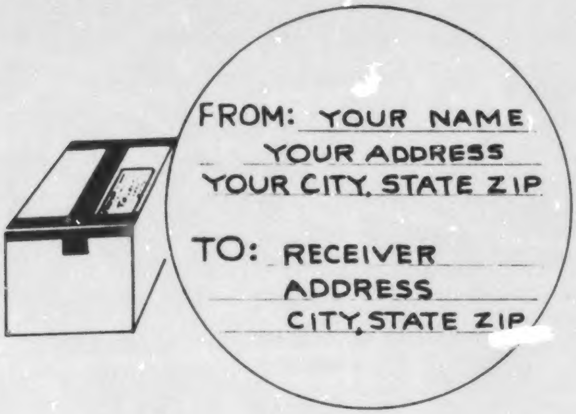

TAPE IN CENTER IF GAP IS MORE THAN 5"

Courtesy U.S. Postal Service

INSTRUCTION SHEET II, (page 8)

HOW TO ADDRESS A PACKAGE FOR MAILING

(AS RECOMMENDED BY THE POSTAL MANUAL)


FROM: YOUR NAME
YOUR ADDRESS
YOUR CITY, STATE ZIP
TO: RECEIVER
ADDRESS
CITY, STATE ZIP

Courtesy U.S. Postal Service

INSTRUCTOR'S FINAL CHECKLIST

PREPARING GOODS FOR RETURN TO VENDOR

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

The student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
1. Weighed the merchandise correctly	☐	☐	☐	☐
2. Filled out the charge-back correctly	☐	☐	☐	☐
3. Used packing filler properly	☐	☐	☐	☐
4. Wrapped the merchandise properly	☐	☐	☐	☐
5. Filled out the address label properly	☐	☐	☐	☐
6. Indicated the method of shipment	☐	☐	☐	☐
7. Provided all addresses needed on wrapped merchandise	☐	☐	☐	☐

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PREPARING GOODS FOR RETURN TO VENDOR.

Your instructor will provide you with merchandise, containers, and shipping materials. Prepare the merchandise for return to the vendor.

RETAILING

TRANSFERRING MERCHANDISE TO BRANCH STORES

INTRODUCTION

As an employee in a retail establishment, you may be requested to transfer merchandise from your department to another store owned by the business. To do this you will have to fill out transfer forms and prepare the merchandise for the transfer. In this module, you will learn how to transfer stock to another store.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order which they are listed.

OBJECTIVE

Given a request for transfer of merchandise, a transfer form, and merchandise, transfer the merchandise. Complete transfer data must be written on the transfer form, and the merchandise must be correctly prepared for transferring.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, HOW TO TRANSFER MERCHANDISE TO BRANCH STORES.

   (or)______________________________

2. LISTEN as your instructor discusses and demonstrates "How to Transfer Merchandise to Other Stores."

   (or)______________________________

3. CHECK YOUR KNOWLEDGE by going through Student Self-Check I, TRANSFERRING MERCHANDISE TO BRANCH STORES. (ASK your instructor for the inter-store transfer form.)

4. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

HOW TO TRANSFER MERCHANDISE TO BRANCH STORES

If you are employed in a retail establishment that has more than one store within its business structure, you will have requests to transfer merchandise from the store where you work to other stores. These requests for transfer may result from:

--Customers' requests for merchandise that is out of stock in one store.

--Special sales of merchandise.

--Maintenance of stock balance.

--Merchandise that is a fast moving item at one store and not at others.

--Alterations or special services at one store and not at others.

Whatever the reason for the transfer of merchandise, if you are requested to make one, you must complete a transfer form so that your store will be able to account for the merchandise (dollar amount) when inventoried. The transfer form serves as dollars for your department and store. When you receive a request for transfer of merchandise, you should follow the following procedures:

1. Obtain a request for transfer form and fill it out according to your store's procedures. For example:
    a. Date the form with the current month, day, year.
    b. Indicate where the merchandise is to be transferred.
    c. Record the style and class number.
    d. Write a description of the merchandise.
    e. Record the retail price of each item of merchandise and the total dollar amount.
    f. Record the number of items of merchandise that are being transferred.
    g. Indicate the reason for transferring the merchandise.
    h. Sign the transfer form.
    i. Have the transfer authorized by a designated store employee.
    j. Adjust the store's inventory records.

2. Prepare the merchandise for transfer.

    a. Select a proper kind and size of container that will protect the merchandise during shipment.
    b. Wrap the merchandise carefully if it is breakable.
    c. Write the name of merchandise on the container.
    d. Send a copy of the transfer form to the requesting store.

INSTRUCTION SHEET I, (page 2)

3. Either take or request that the merchandise and a copy of the transfer form be taken to the shipping department for delivery to the requesting store.

4. Route a copy of the transfer form to your store's business office.

STUDENT SELF-CHECK I

TRANSFERRING MERCHANDISE TO BRANCH STORES

A. Directions: Read the following information and obtain an inter-store transfer form that can be used for documenting the transfer of merchandise from your instructor. When you have finished, check your answers with your instructor.

One of the stores in your corporation has requested that your department transfer to them 3 pairs of blue jeans size 36-29, code 100, manufacturer's #401, style 3612. Your department's number is 555. The retail unit price is $15.00. Your store number is 2 and the requesting store number is 5. Fill out the transfer form that your instructor gives you.

B. Directions: Answer the following questions concerning transferring merchandise to another store. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

1. Write the letters of the answers to the following question.

   Requests for transfer of stock are made between stores in the same business because:

   a. One store may have a customer request for merchandise that it does not have in stock.
   b. An item of merchandise is being purchased in one store but not in another.
   c. A special sale.
   d. The merchandise needs altering or servicing, and the store does not have the facilities for alteration or servicing it.

2. Answer the following questions by writing a plus (+) symbol if it is true and a minus (-) symbol if it is false. Use a separate sheet of paper for your answers.

   a. The transfer of merchandise form is needed to help both stores that are involved in the transaction maintain a correct inventory.
   b. When merchandise to be transferred, is containerized it helps protect the items from breakage and soilage.
   c. It is not necessary for you to sign the transfer of merchandise form.
   d. Every item of merchandise that is being transferred should be written on the transfer of merchandise form.
   e. When packing merchandise for transfer, you should not take precautions to protect it, because it will be moved only a short distance.
   f. A copy of the transfer of merchandise form should always be sent to the receiving store.

STUDENT SELF-CHECK I, (page 2)

g. The merchandise to be transferred should be taken to the shipping department.

h. When filling out a request for merchandise to be transferred, you should double check the order with the transfer form to determine that all of the requested items are included in the order and that all of the information concerning the transfer is included on the transfer form.

INSTRUCTOR'S FINAL CHECKLIST

TRANSFERRING MERCHANDISE TO BRANCH STORES

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of filling out the store transfer form, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Dated the form with the current date......	☐	☐	☐	☐
b. Indicated where merchandise is to be transferred..............................	☐	☐	☐	☐
c. Recorded style and class number on the form..................................	☐	☐	☐	☐
d. Wrote a description of the merchandise....	☐	☐	☐	☐
e. Recorded the retail price of each piece of the merchandise and the total dollar amount.................................	☐	☐	☐	☐
f. Recorded the number of items being transferred..............................	☐	☐	☐	☐
g. Indicated the person who authorized the transfer of merchandise..................	☐	☐	☐	☐
h. Signed the transfer form.................	☐	☐	☐	☐
i. Had the transfer authorized..............	☐	☐	☐	☐
j. Adequately containerized the merchandise for transfer............................	☐	☐	☐	☐

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor wil rate your performance using the Instructor's Final Checklist, TRANSFERRING MERCHANDISE TO BRANCH STORES.

Your instructor will provide you with a request for merchandise that is to be sent to another store. Fill out an inter-store transfer form for this request and prepare the merchandise for transfer.

Module R-23

RETAILING

DESIGNING AND LETTERING SIGNS

INTRODUCTION

Retailers use many kinds of sales aids to promote their merchandise and customer services. Special sales, fashion shows, advertisements, and signs are a few of these sales aids. Signs are often called silent "salespeople," because they can be used to answer customers' questions about merchandise and services without taking the salespeople's time to talk. Well-planned and informative signs are excellent sales aids. A retail salesperson is often asked to plan and write requisitions for signs. You also may be asked to plan and hand letter signs. In this module, you will learn how to plan and write a requisition for signs from the print shop and how to design and hand letter signs.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided merchandise and three point-of-purchase sign request forms, write sign copy for the merchandise. The plan for the signs should include information that will benefit customers and a message that is brief, factual, and will attract the customer's attention.

(2) Given three articles of merchandise and access to show card lettering tools and supplies, letter show cards for the merchandise. The show cards must be sized and the color must be coordinated appropriately for the display. They should incorporate the principles of artistic design and be informative and readable.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about signing displays in a reference provided by your instructor.

   (or) ________________________________

2. READ Instruction Sheet I, WRITING A SIGN REQUEST FORM.

   (or) ________________________________

3. CHECK YOUR KNOWLEDGE of writing a show card request by completing Student Self-Check I, WRITING A SIGN REQUEST FORM, and PRACTICE filling out the request.

   (or) ________________________________

4. READ Instruction Sheet II, TOOLS AND MATERIALS USED FOR SHOW CARD LETTERING.

   (or) ________________________________

5. READ Instruction Sheet III, SPACING SHOW CARD LETTERS.

   (or) ________________________________

6. READ Instruction Sheet IV, QUALITIES OF GOOD SHOW CARDS.

   (or) ________________________________

7. CHECK YOUR KNOWLEDGE of show cards by completing Student Self-Check II, SPACING SHOW CARD LETTERS.

8. READ Instruction Sheet V, LETTERING THE GOTHIC ALPHABET AND NUMERALS.

   (or) ________________________________

9. CHECK YOUR KNOWLEDGE of lettering with the Gothic alphabet and numerals by completing Student Self-Check III, LETTERING SHOW CARDS WITH GOTHIC LETTERS AND NUMERALS.

10. READ Instruction Sheet VI, LETTERING THE ROMAN ALPHABET AND NUMERALS.

    (or) ________________________________

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LEARNING ACTIVITIES, (page 2)

11. CHECK YOUR KNOWLEDGE of lettering with the Roman alphabet by completing Student Self-Check IV, LETTERING SHOW CARDS WITH ROMAN LETTERS AND NUMERALS.

12. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

INSTRUCTION SHEET I

WRITING A SIGN REQUEST FORM

Many retailers have in-store print shops where signs are printed. Signs may be requested by buyers, department managers, and salespeople. In order for the printshop to know what to print, a sign requisition form must be completed. Often salespeople are given this responsibility.

Print shop requisition forms will be different from store to store; however, each one will ask the requestor for the same information. The following sign request form is included so that you can become knowledgeable about the information that you as a salesperson will have to include when requesting store signs. As you look at the sign request form do the following:

1. Write in the date the requisition is written.

2. Write in the name of your department, for example: Sporting Goods, Hardware, Electronic Equipment, Home Furnishings.

3. Select the number of signs you will need, and place this number beside the size of sign you wish printed.

4. Card stock is available in many colors. Select the color you wish and write it in the space below "Color Preference."

5. Card stock is available in varied thicknesses, such as 4-ply and 14-ply. Select the thickness of card stock that you need and write it in this space.

6. Sign lettering styles should be appropriate for the merchandise being sold. Select an appropriate lettering style and write it in the correct space.

7. The print shop has to know when your department will need the sign so that they can plan the work schedule. Write in the date that you will need the sign.

8. Sign your name to the sign request form. Should any questions concerning the sign arise, the print shop will know whom to contact.

   The sign copy is the message you want the customer to receive.

   In planning the sign copy you should analyze the following:

   --How does it benefit the customer?
   --Does it give pleasure to the user?
   --Does it give comfort?
   --Does it offer protection?

INSTRUCTION SHEET I, (page 2)

--Does it save time or labor?
--Is it a money-saving offer?
--Will it improve appearance?
--Does it offer pride of ownership?
--Does it provide personal security or safety?

Merchandise will often offer the customer combinations of these features. You will have to select one or a combination that can be stated in clear, short words to form a sign headline or an "attention" getting headline. Some examples are:

--A taste treat
--Add a touch of beauty
--A sports person's joy
--Feel secure
--It's new!
--For the hot season
--Why spend a lot
--For your convenience
--Build it yourself
--Going on vacation
--Save
--Special
--Manager's special
--Why push when you can ride
--A first
--Improved
--Brand new
--Never before offered
--Our pleasure to offer you
--Be one of the first
--Yes, we offer charge services

After a sign headline has been selected, the name of the product should follow. Some examples are:

--Step-along shoes
--Pleasant records
--Water skies
--Ezy Riders
--Nails
--Pliers
--Hedge clippers
--Sewing needles
--TV's
--Include the brand name, trademark, and designers if you believe that this information will help sell the merchandise.

INSTRUCTION SHEET I, (page 3)

Next, decide what selling features you want to include on the show card. Some examples are:

- --No-press
- --Automatic cut-off
- --Uses less power
- --Padded handle
- --Easy-clean formica top
- --Light weight
- --Portable
- --Hand crafted
- --Non-rust aluminum

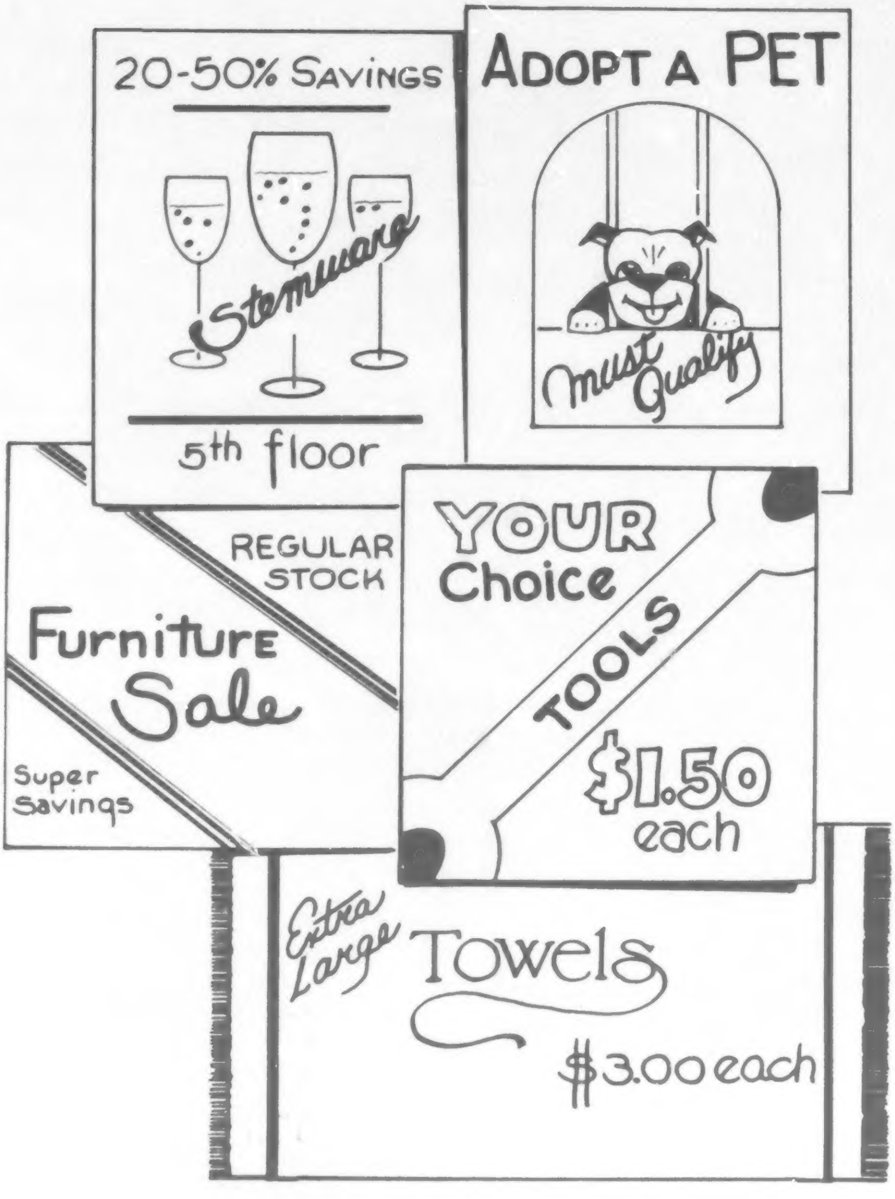
If a guarantee or warranty is a feature of the product, you may choose to include it. Some examples are:

- --12-month warranty
- --4-year limited warranty

The price of the merchandise on the sign requisition form should be written so that the printers will be able to read it easily. Some examples are:

- --$101.98
- --$ 20.99
- --$ 1.99
- --$ 15.88
- --$898.77

Proofread each sign when it is returned from the printer.


20-50% SAVINGS
Stemware
5th floor
ADOPT A PET
Must Qualify
REGULAR STOCK
Furniture Sale
Super Savings
YOUR Choice
TOOLS
$1.50 each
Extra Large
Towels
$3.00 each

STUDENT SELF-CHECK I

WRITING A SIGN REQUEST FORM

Directions: On a separate sheet of paper, complete a print shop sign request form for three of the following items of merchandise. (Request form is on the next page.) You will be graded according to the procedure established by your instructor.

- -- Pleasurevision TV Set
- -- Buzz-A-Along Chain Saw
- -- Reach-Out CB Radio
- -- Nod-A-Way Rocker
- -- Jeans by Igor
- -- Cotton Bed Sheets
- -- Pillow Cases
- -- Catchum Fishing Plugs
- -- Art Prints By I. Brush
- -- Bright Smile Toothpaste
- -- Uth Lipstick
- -- Catchum Rods and Reels
- -- Hear-It-All Stereo Tapes

STUDENT SELF-CHECK 1, (page 2)

SIGN REQUEST FORM

Date Requested ____________________ Date Needed ____________________

Company ____________________ Department ____________________

Address ____________________ ____________________

____

Description

Sign No.	Quantity	Size	Paper		Lettering Style
			Weight	Color	
1					
2					
3					
4					

Copy for Individual Signs

Sign No. 1	Sign No. 2
Sign No. 3	Sign No. 4

Signature of Requestor ____________________ Date ____________________

INSTRUCTION SHEET II

TOOLS AND MATERIALS USED FOR SHOW CARD LETTERING

As a salesperson in a retailing establishment, you may be asked by your store manager or your department manager to hand letter a show card. This request may be for a sign announcing a special sale, it may be for highlighting merchandise, or it may be for announcing a new store service such as delivery service. Whatever the request, you should be able to plan and handletter a sign.

Hand lettering show cards requires special tools and materials. The following list will give you information about the tools and materials you will need.

A. Show Card Brushes:

--Round shaped bristle
--Hairs of red sable
--Soft and springy
--Sizes (6, 7, or 8 inch)

B. Show Card Lettering Pens:

1. Lettering pen points are generally selected on the basis of their use.

    a. The "B" series brush is round shaped. It is generally used for lettering Gothic style.
    b. The "C" series brush has a flat straight edge. It is generally used for lettering Roman style.
    c. The "D" series brush is oblong (egg-shaped). It is generally used for Gothic variations and fill-ins.

2. Each pen point series has the following sizes:

a.	00	e.	3
b.	0	f.	4
c.	1	g.	5
d.	2	h.	6

C. Pen Point Holders:

1. Holders are made of:

    a. Wood
    b. Metal
    c. Plastic

INSTRUCTION SHEET II, (page 2)

2. Be sure to select one that feels comfortable.

D. Lettering Paint:

a. Tempera water-base paints are commonly used for lettering show cards.
b. All colors are available.
c. Colors can be mixed for creating other colors.

E. Lettering Inks:

a. Carbon based, waterproof India ink (black)

b. Transparent ink (variety of colors)

F. Felt Tip Marker

G. Show Card Stock (paper):

1. Card stock (paper) should have a hard, smooth surface, stock with loose fibers may cause inck to run. The various types are:

   a. Poster board
   b. Illustration board
   c. Bristle board

2. Card stock sizes:

   a. Card stock 28 inches by 44 inches can be bought and cut to show card sizes: 5½" X 7", 7" X 11," 11" X 24," 14" x 22," 22" X 28."
   b. Use standard sizes for practice.

H. Commercially Prepared Letters Available for Lettering Show Cards:

a. Rub-on letters
b. Paper cut-outs
c. Pre-cut plastic letters
d. Wooden cut-outs
e. Metal cut-outs
f. Lettering stencils

I. Other Tools and Materials Needed for Show Card Lettering:

a. Pencils
b. Rulers
c. Erasers

INSTRUCTION SHEET III

SPACING SHOW CARD LETTERS

Before you start to practice lettering you must know how to space your letters correctly. The spacing of letters on the show cards makes the copy readable, pleasing to the eye, and demonstrates that you understand the principles of artistic creation.

1. Letters are grouped into three classes: regular, irregular, and circular.

   a. The regular letters are:

      --E
      --H
      --I
      --M
      --N
      --U

   b. The irregular letters are:

      --A
      --F
      --J
      --K
      --L
      --P
      --R
      --T
      --V
      --W
      --X
      --Y
      --Z

   c. The circular figures are:

      --B
      --C
      --D
      --G
      --O
      --P
      --( )
      --Q
      --R
      --S
      --?
      --?

2. Irregular-shaped letters should be spaced closer together to avoid unsightly gaps.

3. Circular and irregular shaped letters should cut into the spaces between them and the letters to either side of their curved or irregular sides.

4. Letters are also classified as narrow, normal, and wide.

   a. The Narrow letters are:

      --B
      --E
      --F
      --I
      --J
      --L
      --P
      --S
      --T
      --Y

INSTRUCTION SHEET III, (page 2)

b. The Normal letters are:

- --C
- --D
- --E
- --G
- --H
- --K
- --O
- --Q
- --R
- --V
- --U
- --X
- --Z

c. The Wide letters are:

- --A
- --M
- --N
- --W

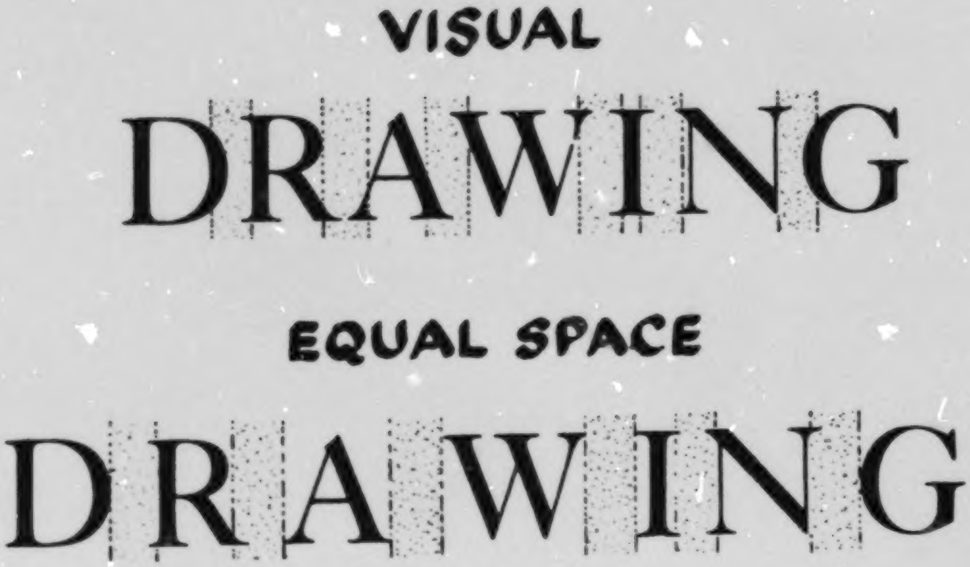
Some rules to follow when spacing narrow, normal, and wide letters are:

1. Wide letters should not be placed into narrow or normal spaces. This may create an illusion of heavily concentrated ink or paint.

2. Narrow letters should not be drawn into wide spaces. This may create an illusion of letter lightness.

3. When you are spacing between words, visualize the imaginary letter O and leave this amount of space between the words.

SPACING


VISUAL
DRAWING
EQUAL SPACE
DRAWING

INSTRUCTION SHEET IV

QUALITIES OF GOOD SHOW CARDS

Each show card that you plan and draw should have the following qualities if it is to attract the attention of customers and help sell merchandise and/or services:

1. The show card must be easily and quickly read by customers.
2. The words used on the card must be factual and descriptive of the product or service.
3. The headline must be brief.
4. The lettering should stand out from the background and show contrast between the two.
5. The lettering must be an appropriate style for the merchandise or service.
6. The show card must be clean and void of spelling errors and blemishes.

STUDENT SELF-CHECK II

SPACING SHOW CARD LETTERS

Directions: Before you begin to practice lettering, you need to check your knowledge of spacing of the letters. Each of the following true or false questions will help you determine if you have this knowledge. On a separate sheet of paper, number 1-6. If the statement is true write a "+." If the statements is false, write a "-." Check your answers according to the procedures established by your instructor.

1. Letter spaces have nothing to do with a well-designed show card.

2. Circle-shaped letters such as O, D, S, Q always take the same space on the show card as the irregular-shaped letters such as Y, Z, and A.

3. Wide letters such as M, W, N, and A should not be put into narrow spaces.

4. Narrow letters should take the same space as wide ones.

5. The amount of space that should be left between words can be visualized as leaving an imaginary O between them.

6. Spacing letters on show cards is important because it helps the customer read the card and illustrates the artist's understanding of the principles of artistic design.

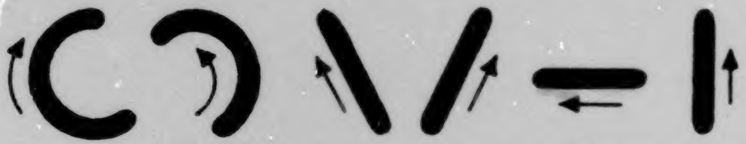
INSTRUCTION SHEET V

LETTERING THE GOTHIC ALPHABET AND NUMERALS

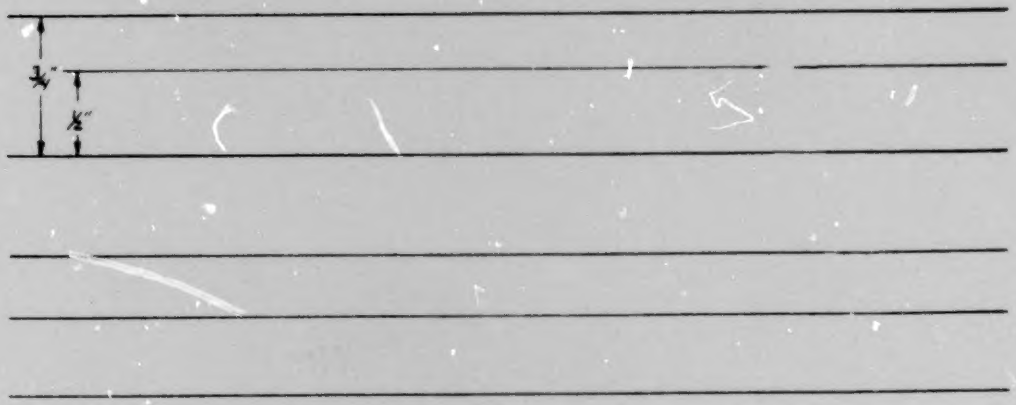
The two most frequently used letter styles for show cards are (1) Gothic and (2) Roman. You will learn how to letter the Gothic alphabet and numerals in this instruction sheet.

The Basic Gothic Alphabet and Numerals

A. The Gothic letters and numerals are formed by using the following strokes.



1. Line several sheets of nonporous card stock as you see below.



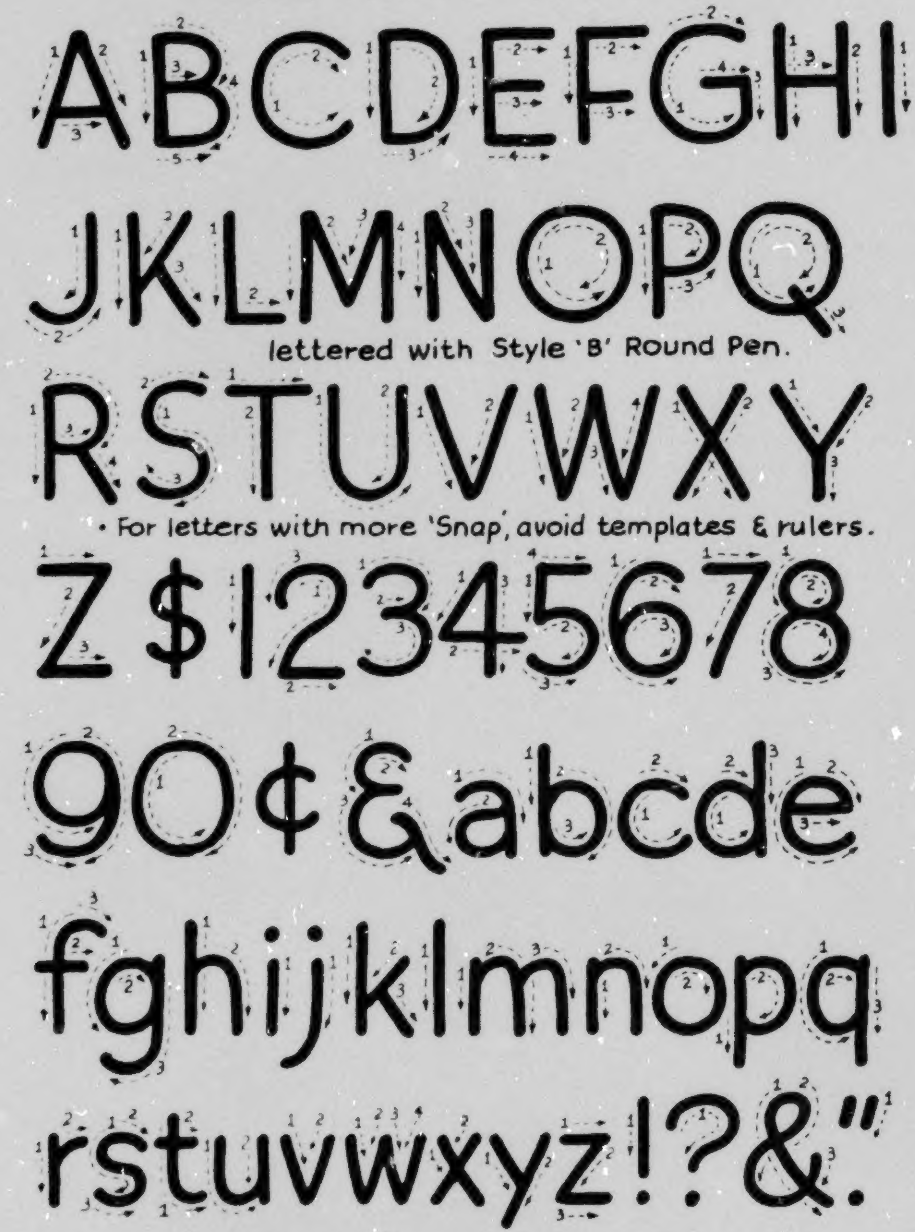
INSTRUCTION SHEET V, (page 2)

2. Using a "B" 2 pen point and holder, India ink, and the lined card stock, practice making each of the basic Gothic strokes.
    a. Fill your pen by shallowly dipping the point into the India ink.
    b. Pull trial strokes to be certain that the ink is flowing evenly.
    c. Keep your pen tip in contact with the paper while pulling each stroke.
    d. Practice pulling the strokes until you can achieve an even, unbroken stroke.
    e. Do not make a stroke over another unless uneven coverage occurs.
    f. Pick up your pen point immediately after finishing each basic stroke.
    g. Rest the heel of the palm of your hand and the side of your little finger on the show card paper.
    h. Place the pen between your thumb and first finger, allowing it to rest on the side of the middle finger.
    i. When pulling strokes, hold the pen at a 45-degree angle to the card stock.
    j. Immediately pick up the point after completing each storke so that a clean ending is produced.
    k. Practice pulling the basic strokes until you feel comfortable in lettering each of them.
    l. Using the lined practice card stock and the Gothic alphabet, practice lettering the alphabet and numerals.
    m. Practice lettering the Gothic alphabet and numerals until you have pen point control and no longer need the Gothic Alphabet and Numeral Learning Aid.

3. Arrows show you the direction to pull the strokes.

4. Numbers show you the order in which to make the strokes.

ONE-STROKE GOTHIC


ABCDEFGHI
JKLMNOPQ
RSTUVWXY
Z$12345678
90¢&abcde
fghijklmnopq
rstuvwxyz!?&".
1234567890

lettered with Style 'B' Round Pen.

• For letters with more 'Snap', avoid templates & rulers.

STUDENT SELF-CHECK III

LETTERING SHOW CARDS WITH GOTHIC LETTERS AND NUMERALS

Directions: You have learned how to space letters for designing show cards. You have also practiced lettering the Gothic alphabet and numerals. Now you are ready to practice lettering show cards. Below are five (5) examples of sign copy. Line show card stock. Using the Gothic style alphabet and numerals, hand letter these five signs. Ask your instructor to check your work.

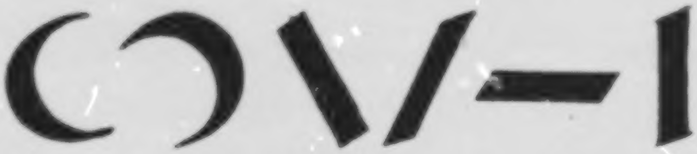
1. White sale 10% off
2. Reduced 20%
3. Your choice $5.99
4. Just arrived at Briscoe's $99.99
5. For your listening pleasure, auto stereo's, home entertainment units, and TV's

INSTRUCTION SHEET VI

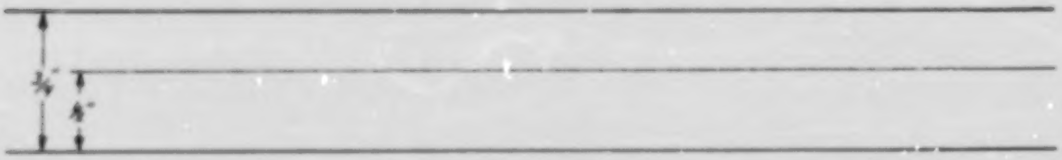
LETTERING THE ROMAN ALPHABET AND NUMERALS

The Roman letters and numerals are like the Gothic, composed of basic strokes. These strokes are best handdrawn with the "C" series chisel headed pen points. It is suggested that you begin with "C" 2 speedball pen point.

Here you see the basic strokes that are used when hand lettering show cards and signs.



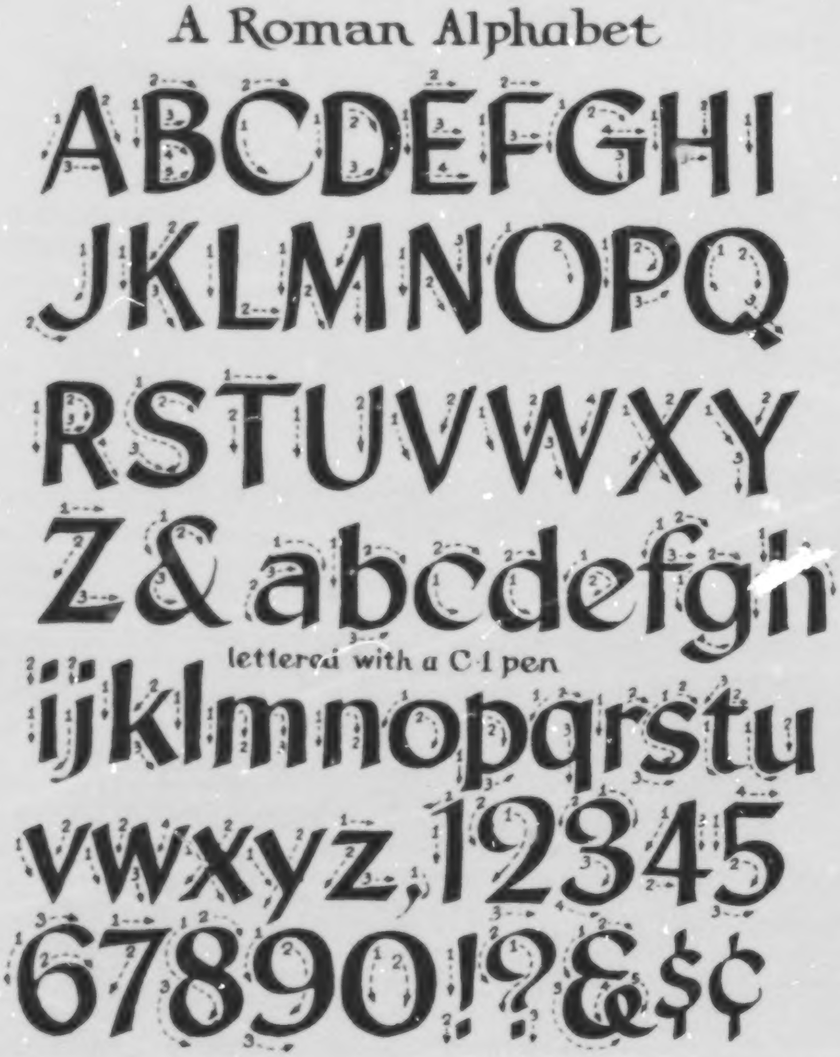
Using the same techniques that you practiced when hand lettering the Gothic alphabet and numerals, line several sheets of nonporous card stock as shown below. Practice drawing (pulling) these strokes until you can draw each with ease. It is suggested that you use a "C" 2 chisel head pen point and India ink.



INSTRUCTION SHEET VI, (page 2)

After you have practiced drawing (pulling) the basic strokes of the Roman alphabet and numerals and you feel confident that you can control the "C" series pen point, line additional card stock and practice drawing each of the following letters, numerals, and symbols.

Remember, the numbers are in the order in which you should draw (pull) the strokes, and the arrows are the directions in which to pull the stroke.


A Roman Alphabet
ABCDEFGHI
JKLMNOPQ
RSTUVWXY
Z&abcdefgh
lettered with a C-1 pen
ijklmnopqrstu
vwxyz,12345
67890!?&$¢

STUDENT SELF-CHECK IV

LETTERING SHOW CARDS WITH ROMAN LETTERS AND NUMERALS

Directions: Using Roman style letters, numerals, and symbols, line card stock using a hard lead pencil and ruler. Use a "C" 1 or "C" 2 chisel head pen point and black India ink. Hand letter the three (3) of the following sign copies.

1. We have video recorders
   TV and appliance department 4th floor

2. See the latest in the prep shop

3. The cash and carry table
   $6.50

4. Levi's

5. Rest-A-Way mattresses
   We work so you may sleep
   Furniture Department 4th floor

You will be graded according to the procedures esblished by your instructor.

INSTRUCTOR'S FINAL CHECKLIST

DESIGNING AND LETTERING SIGNS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
1. The student's Print Shop Request Form:				
a. Was completely filled out..............	☐	☐	☐	☐
b. Had informative copy..................	☐	☐	☐	☐
2. The student's showcards:				
a. Were clean...........................	☐	☐	☐	☐
b. Had all copy spelled correctly.......	☐	☐	☐	☐
c. Could be read quickly................	☐	☐	☐	☐
d. Was informative......................	☐	☐	☐	☐
e. Had copy spaced and balanced for easy reading.............................	☐	☐	☐	☐
f. Was lettered appropriately for the service or product being advertised..	☐	☐	☐	☐
g. Served as a "silent" sales aid.......	☐	☐	☐	☐

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. After you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, DESIGNING AND LETTERING SIGNS.

(1) Your instructor will provide you with three articles of merchandise and three print shop sign request forms. Complete each of the show card requisitions.

(2) Your instructor will provide you with three articles of merchandise. Design and hand letter one show card using the Gothic alphabet and numerals one show card using the Roman style letters and numerals, and one show card using the style of your choice.

RETAILING

SETTING UP DISPLAYS

INTRODUCTION

One of the most important tools used by retailers as an aid in showing customers available merchandise is visual display. Today's retail store is a building that contains displayed merchandise which is offered to help customers satisfy their needs and wants. Employees of retail establishments are expected to set up merchandise displays that will attract the attention of customers and assist in selling merchandise. In this module, you will learn how to set up displays that will attract the attention of customers, displays that will show customers merchandise that will satisfy their needs, and displays that will aid retailers in selling merchandise.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity.

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided merchandise, display space, display tools, and equipment, plan and set up a display. The finished display must meet all applicable criteria on the Instructor's Final Checklist.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, PRINCIPLES OF DISPLAY DESIGN.

   (or)____

2. LISTEN AND OBSERVE as your instructor discusses the purposes of displays and shows you slides of how retailers use displays to meet these goals.

3. READ about the artistic principles of display. Your instructor will provide a reference.

   (or)____

4. COMPLETE Student Self-Check I, PRINCIPLES OF DISPLAY DESIGN.

5. READ Instruction Sheet II, STEPS IN PLANNING A DISPLAY.

   (or)____

6. LISTEN AND OBSERVE as your instructor discusses and shows how to paln and effective display.

7. CHECK YOUR KNOWLEDGE of planning a display by completing Student Self-Check II, PLANNING A DISPLAY.

8. READ Instruction Sheet III, SAFETY STANDARDS FOR DISPLAYS.

   (or)____

9. LISTEN to your instructor discuss safety standards for displays. READ about display safety. Your instructor will provide a reference

10. CHECK YOUR KNOWLEDGE of safety standards for displays by taking Student Self-Check III, SAFETY STANDARDS FOR DISPLAYS.

11. READ Instruction sheet IV, SETTING UP A DISPLAY.

    (or)____

12. LISTEN AND OBSERVE as your instructor discusses and demonstrates how to set up displays.

13. PRACTICE planning and setting up displays in the learning laboratory.

14. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

PRINCIPLES OF DISPLAY DESIGN

When setting up a display, it is important that you understand the principles of design. The following principles should be observed:

1. Balance - This term refers to the optical weight of merchandise. Optical weight refers to whether the merchandise looks heavy or light. Size, color, and shape of an item give an impression of weight.

2. Harmony - This refers to the blending together of related items of merchandise. Line, color, weight, texture, size, and shape determine whether the merchandise blends together.

3. Contrast - This refers to the differences in merchandise which is being compared. Size, shape, and color call attention to the differences seen by the customer. Keep in mind that sharp contrasts may confuse the customer and may confuse the purpose of the display.

4. Emphasis - This refers to directing the customer's attention to key items. Emphasis should not be placed on more than three items, and usually it is better to place emphasis on only one item. Color, weight, line, size, texture, and shape can be used to create emphasis.

5. Proportion - This refers to a pleasing relationship between the shape and size of the merchandise and the display space. When selecting merchandise for a diplay, you should give careful attention to the size and shape of the merchandise and to the display space.

6. Texture - This refers to the look or feel of merchandise. Texture helps to produce contrast and makes an interesting setting for the merchandise.

7. Shape - This refers to the visible characteristics of the merchandise. Examples of shape are oval, round, square, rectangle, triangle, and etc.

8. Color - This refers to the name of the color, the lightness or darkness of the color, and the brightness of a color.

9. Unity - This refers to making a single impression. Unity requires that every element be related to every other element and to the whole design of the display in order to produce a single effect. You should arrange the merchandise so that the customer's eyes move naturally from one item to another item.

10. Repetition - This refers to the reappearance of the same elements of design. Repetition can effectively be used to highlight merchandise.

11. Dominance - This refers to placing emphasis on a particular item of merchandise. Size and color can help to create dominance.

INSTRUCTION SHEET I, (page 2)

12. Rhythm - This refers to the feeling of movement. You can achieve rhythm in a display by placing merchandise close together and other merchandise far apart or by placing merchandise at different heights.

STUDENT SELF-CHECK I

PRINCIPLES OF DISPLAY DESIGN

Directions: Match the term to the definition. Write your answers on a separate sheet of paper. When you have finished, check your answers according to the procedures established by your instructor.

A. balance
B. harmony
C. contrast
D. emphasis
E. proportion
F. texture
G. shape
H. color
I. unity
J. repetition
K. dominance
L. rhythm

1. Placing emphasis on a particular item of merchandise.
2. The optical weight of merchandise.
3. Making a single impression.
4. Differences seen in merchandise which is being compared.
5. Pleasing relationship between the shape and size of the merchandise and display space.
6. The lightness or darkness of the merchandise.
7. The blending together of related items of merchandise.
8. The feeling of movement.
9. The look or feel of merchandise.
10. Directing the customer's attention to key items.
11. The visible characteristics of the merchandise.
12. Reappearance of the same elements of design.

INSTRUCTION SHEET II

STEPS IN PLANNING A DISPLAY

The time you spend in planning your displays will be the best time that you will use. Once you have designed the best route in which to achieve a goal, the destination is much easier to gain. (See form on the following page.)

As you plan your display include the following:

--A written purpose or theme for the display.

--A list of the merchandise that you will use.

--A list of related merchandise if you plan to include any.

--A list of the props that you will include.

--A list of the tools that you will need to set up the display.

--Written copy for the signs or price cards that you will use in the display.

--A simple sketch of how the display will look when you have finished it, including both primary and related merchandise and the show and price cards.

INSTRUCTION SHEET II, (page 2)

DISPLAY PLANNING FORM

Purpose or Theme:

____

Merchandise: ____________________

Related Merchandise: ____________________ ____________________

____________________ ____________________

____________________ ____________________

Props: _______________ _______________ _______________

_______________ _______________ _______________

_______________ _______________ _______________

Tools: _______________ _______________ _______________

_______________ _______________ _______________

_______________ _______________ _______________

Copy for show cards, price cards:

____

____

____

STUDENT SELF-CHECK II

PLANNING A DISPLAY

Directions: Your instructor will give you an item of merchandise that could effectively be used in a display. Using a separate sheet of paper, write a plan that you would follow in setting up this display. When you have finished, check your plan according to the procedures established by your instructor.

Display Planning Form

Purpose or Theme:

____

Merchandise: ____________________

Related Merchandise: ____________________ ____________________

____________________ ____________________

____________________ ____________________

Props: ______________ ______________ ______________

______________ ______________ ______________

______________ ______________ ______________

Tools: ______________ ______________ ______________

______________ ______________ ______________

______________ ______________ ______________

Copy for show cards, price cards:

____

____

____

INSTRUCTION SHEET III

SAFETY STANDARDS FOR DISPLAYS

When setting up displays, it is important that you follow acceptable standards of safety. A safely constructed display will prevent injury to the customer, to you the display builder, and to fellow employees. A well designed and safely constructed display will also help protect the merchandise from breakage and damage.

When you are constructing displays:

1. Use tools that are in good condition.
2. Use tools for their intended purpose.
3. Use only props that are in good condition.
4. Use only props that will safely support the merchandise.
5. Do not overload glass counter tops.
6. Always ask for help if you are not sure.
7. Take your time when setting up the displays.
8. Set up all displays so that no hazards exist.
    a. Avoid setting up displays with sharp edges or pointed corners.
    b. Avoid placing displays too close to the edge of counters where they may be knocked off.
9. Inspect all electrical and lighting fixtures to determine that they are in good condition.
    a. Be sure that cords are not frayed.
    b. Be sure that bulbs do not touch merchandise.
    c. Place cords where employers and customers cannot trip over them.
10. Use only fire resistant accessories in the displays.
11. Avoid too many displays near the check-out area as this will hinder check-out procedures.
12. Avoid placing displays where they will block the view of sales clerks.
13. Should any accidents occur when setting up displays or after they have been set up, report these immediately to your supervisor.
14. Regularly inspect all displays to determine that all safety factors are being maintained.

STUDENT SELF-CHECK III

SAFETY STANDARDS FOR DISPLAYS

Directions: On a separate sheet of paper, put a "+" in the blank if the statement is true. Put a "-" in the blank if the statement is false. When you have finished, check your answers according to the procedures established by your instructor.

1. You should select props that will safely support all displayed merchandise.
2. You should place a large quantity of merchandise on a glass-topped counter.
3. You should set up a display in a hurry.
4. You should report all accidents and injuries.
5. All electrical and lighting fixtures should meet safety standards.
6. You should never ask for help in setting up a display.
7. You should place merchandise so that no hazards exist.
8. You don't have to worry about sharp edges or corners in a display.

INSTRUCTION SHEET IV

SETTING UP A DISPLAY

When you are setting up a display, you want to follow a plan that will attract the attention of customers, maintain the image of the store, show merchandise at its best, and sell the merchandise. The following guidelines will help you set up displays of which you will be proud.

You have already learned how to design plans for displays. Now you need to use this skill. Using your written plan:

1. Letter your show cards and/or price cards.
2. Assemble all of the materials that you will need for setting up the counter display.
    - a. Tools
    - b. Props
    - c. Merchandise
    - d. Accessories
    - e. Price markers
    - f. Show and/or price cards
    - g. Your sketch
    - h. Cleaning tools and materials
3. If necessary, dismantle the existing display, returning merchandise and display materials to stock or storage area.
4. Thoroughly clean the display area.
5. Using your sketch, set the display props into position.
6. Price mark the merchandise.
7. Place the merchandise on the display props.
    - a. Position merchandise so that the labels can be easily read by the customers.
    - b. Place the merchandise and props so that neither will create a hazard.
    - c. Locate the merchandise so that it can be easily examined by the customers.
8. When you are satisfied that you have arranged the merchandise safely, neatly, and attractively, place the show and/or price cards on or near the merchandise.
    - a. Placing the show and price cards in holders will help keep them in good condition.

INSTRUCTION SHEET IV, (page 2)

b. Check show and price cards for neatness and accuracy.

9. Stand back and check your display. Does it:

   a. Show the customer the merchandise in an attractive manner?
   b. Help sell the merchandise?
   c. Follow acceptable principles of display design?
   d. Meet safety standards?
   e. Contain effective show or price cards?
   f. Show the merchandise so that the customer can read the labels?
   g. Effectively use related merchandise?

10. Clean up all trash from the area.

11. Return tools and materials to the storage area.

12. Ask your instructor to check your finished display. It helps to ask an associate to check your display to determine if it does have selling power.

INSTRUCTOR'S FINAL CHECKLIST

SETTING UP DISPLAYS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of setting up a display, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Wrote a plan for the display..............	[ ]	[ ]	[ ]	[ ]
b. Incorporated the principles of display design....................................	[ ]	[ ]	[ ]	[ ]
c. Used safety standards in the displays.....	[ ]	[ ]	[ ]	[ ]
d Used guidelines for setting up the displays.................................	[ ]	[ ]	[ ]	[ ]
e. Constructed a display that will sell merchandise................................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statement below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, SETTING UP COUNTER DISPLAYS.

Your instructor will give you merchandise, display space, display tools, and equipment. Set up a display.

RETAILING

DRESSING MANNEQUINS

INTRODUCTION

Many of the displays you will have to build as a stockperson or a salesperson will require the use of mannequins. In this module, you will become familiar with the parts of a mannequin and you will learn how to dress and accessorize them.

DIRECTIONS

Read the objective below. If you think that you are already able to perform these tasks, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a mannequin, clothing, accessories, tools, and equipment, dress the mannequin. The mannequin must be dressed and accessorized appropriately without damaging any of its parts or the merchandise.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about dressing and using mannequins. Your instructor will provide a reference.

   (or) ____

2. READ Instruction Sheet I, MANNEQUINS: A VERY IMPORTANT DISPLAY.

   (or) ____

3. READ Instruction Sheet II, DRESSING A MANNEQUIN.

   (or) ____

4. LISTEN and OBSERVE as your instructor discusses and demonstrates how to dress a mannequin.

5. PRACTICE dressing and accessorizing mannequins in the learning laboratory.

6. CHECK YOUR KNOWLEDGE of dressing and accessorizing a mannequin by completing Student Self-Check I, DRESSING A MANNEQUIN.

7. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

MANNEQUINS: A VERY IMPORTANT DISPLAY PROP

The stock clerks and sales people in retail establishments are expected to dress mannequins. Mannequins are effective display props when they are appropriately used in the store. These display props can effectively be used for:

1. Introducing new products to customers.
2. Introducing seasonal fashion merchandise to customers.
3. Showing customers sale items.
4. Showing customers how merchandise can be used.
5. Introducing fashion accessories to customers.
6. Showing related merchandise to customers.
7. Assisting the customers in making buying decisions which result in the selling of merchandise.

Mannequins are available to the retailer in many varied forms (see illustrations). Children, men, and women are all available to the retailer from display manufacturers. The retailer buys the ones that will produce the best store image.

Before you begin to practice dressing mannequins there are some guidelines that you must know and be able to perform.

1. Mannequins are expensive and must be handled with care when they are being dressed and accessorized.
2. Mannequins should only be used when they can effectively display merchandise.
3. Use only mannequins that are in excellent condition as display props.
4. Always have a reason for using a mannequin as a display prop.
5. Mannequins must be clean, wigs in good condition, and void of visibie damage if used as display props.
6. Before using a mannequin as a display prop ask yourself, why you are going to use it, what you will display on it, where you will place it, how long you should use it, and will it help the customer make buying decisions. After you have answered these questions and you have decided to use the mannequin as a display prop, you are ready to dress and accessorize the mannequin.

INSTRUCTION SHEET II

DRESSING A MANNEQUIN

The Female Mannequin

Female mannequins vary in the ways that they can be disassembled for dressing. The following instructions will be for mannequins that can be disassembled for dressing. Some of the steps in dressing the fixed form mannequin will not be appropriate; however, the major difference will be that you will eliminate some of these illustrated steps. See illustrations on following pages.

1. Assemble clothing, accessories, and cleaning materials to be used for dressing the mannequin.
2. Remove the wig. If the wig cannot be removed, cover it with a plastic bag.
3. Clean the mannequin. NOTE: Place all parts of mannequin out of customer traffic area to prevent accidents and damage to mannequin.
4. Unlock and remove the arms.
5. Unlock and disassemble the torso from lower half of the mannequin, after loosening the set screws.
6. Remove the stand from the lower half of the mannequin.
7. Turn lower half of the mannequin upside down and carefully put on hose.
8. If you are displaying slacks, slip them over the lower half of the mannequin.
9. Place the shoes on the feet and fasten them.
10. Place the lower half of the body on the support rod and tighten the set screws.
11. Attach the torso of the mannequin to the lower half of the body. Take care to avoid damaging the slacks. Lock the torso in position.
12. Place unbuttoned sweater/blouse or shirt on the torso.
13. Place unbuttoned dress or coat on the mannequin.
14. Carefully slip the arms up the sleeves of the garment and securely lock into position.

INSTRUCTION SHEET II, (page 2)

15. Button/zip each garment starting with the innermost garment.

16. Select a wig and/or scarf and place on the head of the mannequin.

17. Accessorize the mannequin with a hat/bracelets/necklaces and other accessories.

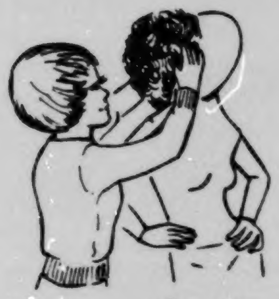
18. Smooth out wrinkles in garments.

19. Remove loose threads, hide hang tags or tickets which detract from the mannequin.

The Male Mannequin

The male mannequins are dressed similarly to the female mannequins when preparing them with slacks. The primary difference is that the male mannequins are supported at the ankle rather than at the buttocks.

INSTRUCTION SHEET II, (page 3)



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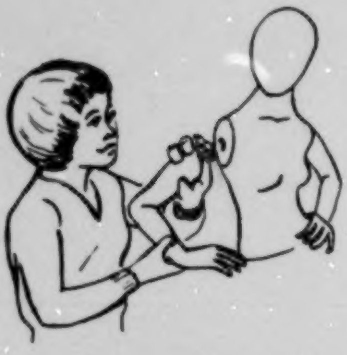

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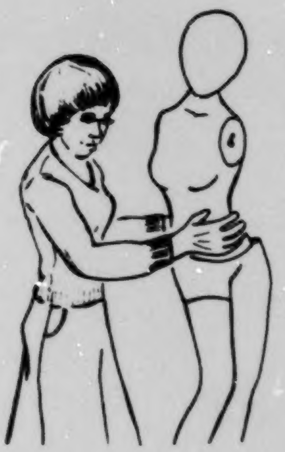

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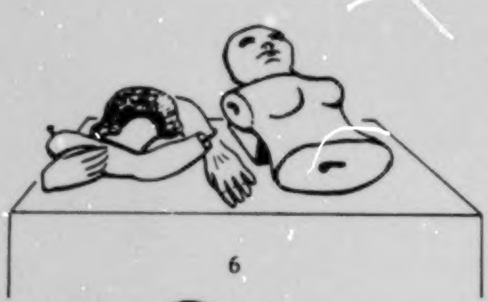

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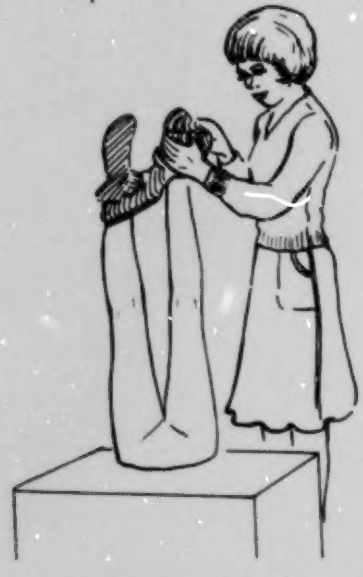

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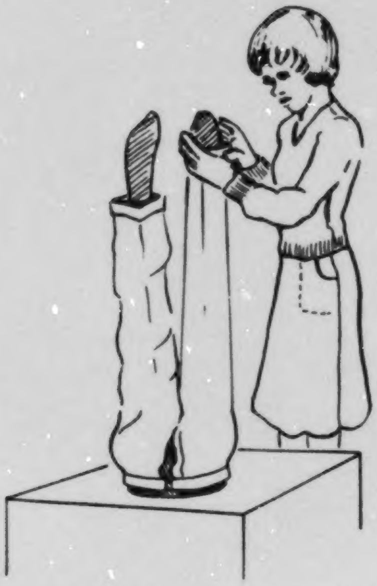
INSTRUCTION SHEET II, (page 4)



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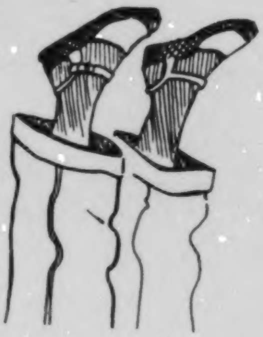

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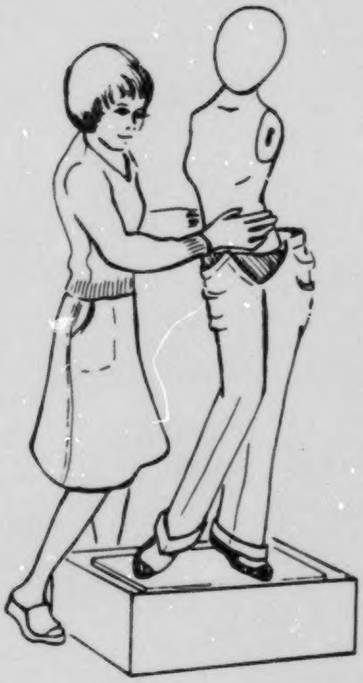

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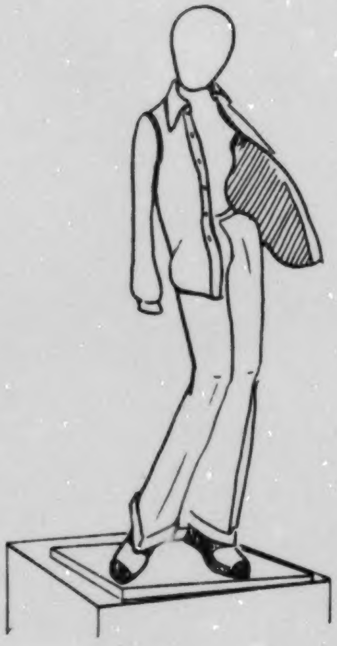

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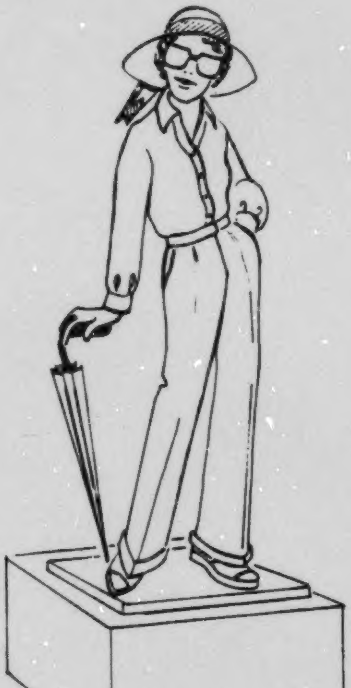

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STUDENT SELF-CHECK I

DRESSING A MANNEQUIN

Directions: After you have practiced dressing a mannequin in the learning lab, use the following checklist to determine if you performed each step properly. As I dressed, the mannequin I:

1. Assembled all of the tools, clothing, and accessories before starting to dress the mannequin.
2. Removed or covered the wig with a plastic bag.
3. Unlocked and removed the detachable arms.
4. Disassembled the torso from the lower half of the mannequin.
5. Loosened the set screws and removed the stand from the lower half of the body.
6. Turned the lower half of the mannequin's body upside down and put on hose or socks.
7. Slipped the slacks over the feet and up the body.
8. Placed shoes on the feet and fastened.
9. Placed the lower half of the mannequin on the support rod and fastened the set screws.
10. Reattached the torso of the mannequin to the lower half and locked into position.
11. Placed unbuttoned sweater/blouse/shirt on the torso of the mannequin.
12. Placed unbuttoned coat on mannequin.
13. Slipped arms of the mannequin up the sleeves of the garment and securely locked each into position.
14. Buttoned each garment beginning with the innermost item.
15. Selected a complementary wig and/or scarf and placed on mannequin.
16. Added complementary accessories such as hat, scarf, necklace, or bracklets.
17. Smoothed out wrinkles.

STUDENT SELF-CHECK, (page 2)

18. Checked the mannequin for loose threads, hang tags, and tickets.

19. Dressed the mannequin following the rules of safety:

    a. Avoided placing the parts of the mannequin in customer traffic aisles.
    b. Placed the parts of the mannequin where they would not cause customer or employee accidents.

If you have checked each of these steps "yes," then you have successfully dressed a mannequin. If you have checked any of these steps "no," you should practice that step(s) until you feel that you can successfully perform it.

INSTRUCTOR'S FINAL CHECKLIST

DRESSING MANNEQUINS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When dressing a mannequin, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Selected appropriate materials, clothing, and accessories	[ ]	[ ]	[ ]	[ ]
b. Removed or covered the wig with a plastic bag	[ ]	[ ]	[ ]	[ ]
c. Unlocked and removed the detachable arms	[ ]	[ ]	[ ]	[ ]
d. Disassembled the torso from the lower half of the mannequin	[ ]	[ ]	[ ]	[ ]
e. Loosened the set screw and removed the stand from the lower half of the body	[ ]	[ ]	[ ]	[ ]
f. Turned the lower half of the mannequin's body upside down and put on hose or socks ...	[ ]	[ ]	[ ]	[ ]
g. Slipped the slacks over the feet and up the body	[ ]	[ ]	[ ]	[ ]
h. Placed the correct size shoes on the feet and fastened	[ ]	[ ]	[ ]	[ ]
i. Placed the lower half of the mannequin on the support rod and fastened the set screw ..	[ ]	[ ]	[ ]	[ ]
j. Reattached the torso of the mannequin to the lower half and locked into position	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
k. Placed unbuttoned sweater/blouse/shirt on the torso	[ ]	[ ]	[ ]	[ ]
l. Placed unbuttoned coat on the mannequin	[ ]	[ ]	[ ]	[ ]
m. Slipped arms of the mannequin up the sleeves of the garment and securely locked each into position	[ ]	[ ]	[ ]	[ ]
n. Buttoned each garment beginning with the innermost one	[ ]	[ ]	[ ]	[ ]
o. Selected a complementary wig/scarf	[ ]	[ ]	[ ]	[ ]
p. Added complementary accessories such as: hat, scarf, or necklace	[ ]	[ ]	[ ]	[ ]
q. Smoothed out wrinkles	[ ]	[ ]	[ ]	[ ]
r. Removed price tags and hand tags	[ ]	[ ]	[ ]	[ ]
s. Dressed the mannequin using acceptable safety procedures	[ ]	[ ]	[ ]	[ ]
t. Dressed the mannequin without damaging any of its parts or merchandise	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, DRESSING MANNEQUINS.

Your instructor will provide you with a mannequin, tools, material, clothing, and accessories. Dress the mannequin.

RETAILING

SETTING UP AND DISMANTLING WINDOW DISPLAYS

INTRODUCTION

Are you creative? Do you enjoy planning, constructing, and assembling the plan that you developed into its final form? If you enjoy these activities, you will fully appreciate the task of setting up window displays. Stock clerks and salespeople often are requested to set up window displays. These displays are important because they assist in creating and maintaining a store's image, and also act as silent sales aids. In this module, you will learn how to set up and dismantle window displays.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order which they are listed.

OBJECTIVE

Given a theme for a window display, merchandise, display accessories, and tools: plan, set up, and dismantle a window display. The display must be appropriate for the theme, show cards and price cards should fit the theme, principles of design should be incorporated, and the display should be safely and appropriately dismantled.

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LEARNING ACTIVITIES

1. READ about planning and setting up window displays. Your instructor will provide a reference.

   (or) ____

2. LISTEN to your instructor discuss: "Planning, Setting Up, and Dismantling Window Displays."

   (or) ____

3. READ Instruction Sheet I, PLANNING AND SETTING UP AN EFFECTIVE WINDOW DISPLAY.

   (or) ____

4. CHECK YOUR KNOWLEDGE of setting up window displays by taking Student Self-Check I, SETTING UP WINDOW DISPLAYS.

5. READ Instruction Sheet II, SETTING UP A WINDOW DISPLAY.

   (or) ____

6. LISTEN and OBSERVE as your instructor demonstrates how to set up and dismantle a window display.

   (or) ____

7. PRACTICE planning and setting up a window display in the learning laboratory. (ASK your instructor to approve your plan before setting it up. Also, ASK your instructor for Student Self-Check II, WINDOW DISPLAY CHECKLIST, to use for evaluating your display.)

8. READ Instruction Sheet III, DISMANTLING DISPLAYS.

   (or) ____

9. CHECK YOUR KNOWLEDGE of dismantling window displays by taking Student Self-Check III, PLANNING TO DISMANTLE DISPLAYS.

10. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

PLANNING AND SETTING UP AN EFFECTIVE WINDOW DISPLAY

One of the most effective advertising tools available to retailers is the window display. It is often said that the first impression is the lasting impression. If this is true, the window display is of prime importance to the retailer. The following guidelines will help you learn how to plan an effective window display.

1. Plan you window display based on a central theme or idea:

   a. Holidays
      (1) Chrismas
      (2) Easter
      (3) Father's Day
      (4) Mother's Day
      (5) Others

   b. Seasons
      (1) Spring
      (2) Summer
      (3) Fall
      (4) Winter

   c. New merchandise

   d. Related items

   e. Special sale items

2. When making your plans, consider the following suggestions:

   a. Select merchandise that reflects your central theme or idea.

   b. Select merchandise that will fit in the allotted space without being overcrowded.

   c. Select merchandise that is fresh and clean.

   d. Select merchandise that will be interesting to customers.

3. Plan your window display colors to:

   a. Attract shoppers' attention

   b. Establish moods

   c. Fit the theme

INSTRUCTION SHEET I, (page 2)

4. Incorporate the principles of display design into your plan:
   a. Shape
   b. Balance (symmetrical or asymmetrical)
   c. Rhythm
   d. Harmony
   e. Repetition
   f. Unity
   g. Focal area
5. Draw a sketch of your display to include:
   a. Backdrops
   b. Props and fixtures
   c. Merchandise as it will be displayed
   d. Price cards
   e. Additional lighting, if you plan to use it
6. Write a list of tools and materials that you will need to build the display. Include:
   a. Tools
   b. Props and fixtures
   c. Backdrops
   d. Lights
   e. Merchandise to be displayed
   f. Show and price cards
7. If you desire, write title cards to be placed in the display.

STUDENT SELF-CHECK I

SETTING UP WINDOW DISPLAYS

Directions: On a separate sheet of paper answer each of the following questions concerning setting up window displays. Check your answers according to the procedures established by your instructor.

1. Before setting up a window display the display builder should write a plan for it. This plan should include which of the following:

   a. Theme
   b. Sketch
   c. Materials to be used
   d. Tools and equipment to be used
   e. Merchandise
   f. Lighting props
   g. Copy for show cards

2. Which of the following ideas could a display builder use as a theme for a window display.

   a. The merchandise
   b. Local, state or national upcoming events
   c. Holidays
   d. Seasons
   e. Store promotions
   f. Sales

3. A display builder should include a sketch of the proposed display in the plan. Select the word that best describes how the sketch will help when setting up the display.

   a. Blueprint
   b. Merchandise
   c. Show cards
   d. Check list

4. Choose the statements that describe the activities, which are involved in setting up and dismantling window displays.

   a. Prepare the window display space.
   b. Remove merchandise and props from existing display.
   c. Return merchandise to departments from which it came.
   d. Place props in storage for future use.
   e. Clean glass surfaces.
   f. Sweep floors.
   g. Clean background.
   h. Check lighting fixtures to determine if they are in good repair.
   i. Print or hand letter price or showcards.

STUDENT SELF-CHECK I, (page 2)

j. Construct props in the shop.
k. Assemble props, tools, merchandise, show and price cards.
l. Check all items to be used in the display for cleanliness and good condition.
m. Using the sketch as a guide, begin setting up the display.
n. Place and anchor backdrops into the display space.
o. Position large props.
p. Position mannequins, if used.
q. Place merchandise on props.
r. Put accessories into position.
s. Place show/price cards in front where customers can see them.
t. Make minor adjustments, if needed, to create a display that has proportion and balance.
u. Remove and store all tools and equipment.
v. Check the display from the custome's viewpoint to determine that it does, in fact, possess "selling power."
w. If needed, make final adjustments.

INSTRUCTION SHEET II

SETTING UP A WINDOW DISPLAY

Once you have planned your display, follow the steps below to set it up.

1. Keep safety precautions in mind. Remember that you will be working near glass.
2. Remove old displays before starting to construct new ones.
3. Thoroughly clean the display area, including the glass, before beginning the new display.
4. Collect all tools and materials needed for assembling your display, using the list in your plan.
5. Prepare the showcards that you will need.
6. If props are needed, build them in the workshop area and move them to the window display area only when they are needed.
7. Place the background and the props in position according to plan, modifying as appropriate.
8. Place the merchandise on the props.
9. Place your show cards where customers can easily see them.
10. Place your price cards near or on merchandise (optional).
11. Add lighting, if needed, to highlight merchandise.
12. Check your finished window display, and make the adjustments that you feel are necessary.

STUDENT SELF-CHECK II

WINDOW DISPLAY CHECKLIST

Directions: Evaluate the window display you set up in Learning Activity 6 using the checklist below. Number your paper from 1-8. If you feel that you have successfully performed one of the following steps, write YES on your paper. If you feel that you need additional practice to master a specific step, write NO on your paper and practice ONLY this step again.

1. I wrote complete plans before building my window display.
2. Using my plan, I assembled tools and materials before beginning to construct my display.
3. If I needed props, I assembled them in the workshop area.
4. I drew all show cards and price cards before beginning my display.
5. I collected all of the merchandise, tools, and materials before beginning to set up my display.
6. I followed all practical rules of safety while setting up my window display.
7. I followed my sketch in constructing my window display.
8. My completed window display meets the following criteria: (Write the appropriate letters on your paper.)
   a. It will attract attention of passers-by.
   b. It has a sufficient amount of merchandise.
   c. The props do not distract the attention from the displayed merchandise.
   d. The related merchandise is used (if appropriate).
   e. The show cards and price cards add to the total display.
   f. The window glass is clean.
   g. The props and fixtures are in good repair.
   h. The merchandise is fresh, clean, and appropriate.
   i. The floor is clean.

STUDENT SELF-CHECK II, (page 2)

j. The colors are complementary.

k. The merchandise is placed so that each item is highlighted.

l. The display design principles are incorporated.

m. I feel that my window display will aid in selling merchandise.

NOTE: If a camera is available, take a photograph of your completed window display to keep for future references. You may also want to have a fellow student or your instructor evaluate the display.

INSTRUCTION SHEET III

DISMANTLING DISPLAYS

When setting up or dismantling displays, salespeople and stock people must be considerate of the merchandise, the display props, and the accessories that are being used. Each of these items has been an expense to the store and care must be taken so that they can be used again or sold. You will be learning how to safely dismantle displays. But before you do, read the following suggestions and when you begin to dismantle displays, think back to these and use them.

1. Your store has to pay for the merchandise, the display materials, and props that are used in displays. Therefore, when you are dismantling displays, make an all out effort not to damage any of these items.

2. Before you begin to dismantle a display, stop and think: "How was this display set up?" Then, if you will reverse the order of how it was set up, you should have no problems when dismantling it. You may need to talk to the store employee who set it up if you cannot determine this order.

3. Tacks, staples, pins, and other holding devices are used in displays to adjust merchandise. Remove these carefully when dismantling displays. For example, do not remove clothing displayed on a mannequin until you have determined that there are no pins in the garments.

4. When dismantling displays, do not place the dismantled parts in customer traffic aisles.

5. Make every effort to use tools that are designed specifically for the purpose when dismantling the display. For example, if a nail is to be removed, use a claw hammer or nail puller not a screw driver.

6. Unplug all accessory lighting devices before beginning to dismantle displays.

7. Each retail store will have a policy concerning the return of displayed merchandise. For example, some stores want displayed merchandise returned and checked in at the stock room; some will want displayed merchandise returned to the selling department and checked in; while others will want the merchandise put into selling floor stock.

8. Should the displayed merchandise be damaged or shop-worn, report this to the store employee who receives the return.

9. After you have dismantled the display, return all props, signs, lighting accessories, tools, and display materials to the storage area. Place each of these in the appropriate location in the storage area.

10. Clean the area where the display was located. Dispose of trash and return cleaning tools and materials to storage area.

Each display, as you know, is different; however there are basic steps that are followed when each is dismantled.

1. Observe the display and determine what tools you will need for dismantling it:
    a. Hammer
    b. Staple remover
    c. Carts for carrying merchandise to stockroom or department
    d. Cleaning equipment and supplies
2. Examine the display to determine how it was set up.
3. Reverse the set-up order and dismantle the display; for example (see illustration):
    a. Remove the accessory lighting props (check cords).
    b. Remove the show cards and price cards.
    c. Remove the merchandise.
    d. Remove the props.
    e. Remove the display background.
    f. Return the lighting props, the show cards, the price cards, and the props to the display storage area.
    g. Store each of these items so that they can be used for future displays.
    h. Clean the display area:

        --Sweep up all trash
        --Clean glass area
        --Clean fixtures
        --Dispose of trash
4. As you dismantle each display, practice the following general rules of display safety:

a. Avoid placing the parts of the dismantled display in customer traffic areas.
b. Use only tools that are designed for the task.
c. Check lighting props and cords to determine that each is not damaged.
d. Be extra cautious when dismantling window displays. Do not bump glassed areas. Avoid bumping the glassed area with your body or tools.

R

STUDENT SELF-CHECK III

PLANNING TO DISMANTLE DISPLAYS

Directions: You have set up a window display. It now must be dismantled. Before you start to dismantle the display, write a plan that will describe to your instructor how you will do it. Your plan must include:

1. The tools and equipment that you will need for dismantling the display.
2. The safety precautions that you will follow when dismantling the display.
3. The steps that you will take to dismantle the display.

When your plan is finished, give it to your instructor for approval. After your instructor has approved your plan, dismantle the window display that you have set up, as your instructor observes.

INSTRUCTOR'S FINAL CHECKLIST

SETTING UP AND DISMANTLING WINDOW DISPLAYS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When setting up and dismantling the window display, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Followed safety procedures when setting up and dismantling the display............	[ ]	[ ]	[ ]	[ ]
b. Selected props that were suitable and that blended into the overall display.....	[ ]	[ ]	[ ]	[ ]
c. Constructed the display safely and anchored it securely.....................	[ ]	[ ]	[ ]	[ ]
d. Set up a clean, neat display.............	[ ]	[ ]	[ ]	[ ]
e. Selected colors and merchandise that were appropriate for the theme................	[ ]	[ ]	[ ]	[ ]
f. Used appropriate show cards and price cards....................................	[ ]	[ ]	[ ]	[ ]
g. Incorporated the principles of design in the display............................	[ ]	[ ]	[ ]	[ ]
h. Set up a window display that would assist in selling merchandise..................	[ ]	[ ]	[ ]	[ ]
i. Logically dismantled the display by reversing the set up process.............	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

SETTING UP AND DISMANTLING WINDOW DISPLAYS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
j. Avoided damaging props, merchandise, and accessories..............................	[ ]	[ ]	[ ]	[ ]
k. Performed housekeeping activities.........	[ ]	[ ]	[ ]	[ ]
l. Stored tools and supplies.................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statement below explains the activity you must be able to complete in order to finish this module. After you have gone through the activity, your instructor will rate your performance using the Instructor's Final Checklist, SETTING UP AND DISMANTLING WINDOW DISPLAYS.

Your instructor will provide a theme for a window display. After you obtain the necessary supplies, you will plan, build, and dismantle the display.

RETAILING

OPENING AND CLOSING THE STORE

INTRODUCTION

Your store owner or manager may ask you to open and/or close the store at the beginning and close of a business day. This task is one that must not be taken lightly as it does have a high degree of responsibility. In this module, you will learn the procedures and the activities that are performed when opening and closing a store.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a list of activities that are performed when opening and closing a store, identify the ones performed when opening and those that are performed when closing. You should identify these activities with 90% accuracy.

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, OPENING THE STORE.

   (or) ______________________________

2. CHECK YOUR KNOWLEDGE of opening the store by completing Student Self-Check I, OPENING THE STORE.

3. READ Instruction Sheet II, PREPARING THE DEPARTMENT FOR DAILY BUSINESS.

   (or) ______________________________

4. LISTEN as your instructor discusses opening the store and department for business.

   (or) ______________________________

5. CHECK YOUR KNOWLEDGE of preparing the department for business by completing Student Self-Check II, PREPARING THE DEPARTMENT FOR DAILY BUSINESS.

6. READ Instruction Sheet III, PREPARING THE CASH REGISTER CASH DRAWER.

   (or) ______________________________

7. READ Instruction Sheet IV, CLOSING THE DEPARTMENT.

   (or) ______________________________

8. CHECK YOUR KNOWLEDGE of closing the department by taking Student Self-Check III, CLOSING THE DEPARTMENT.

9. LISTEN and OBSERVE as your instructor discusses and demonstrates closing departments and how to close out the cash register in your classroom.

   (or) ______________________________

10. PRACTICE closing out the cash register in your classroom.

11. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

OPENING THE STORE

Managers or owners of retail establishments may ask store employees to open the store at the beginning of a business day. This task is one that must not be taken lightly, for it does contain a high degree of responsibility. Opening procedures will differ with each store. It is the responsibility of each employee who is assigned this task to learn the specific activities of opening that are expected by the store manager.

Although store opening procedures will be different with each store, the following activities are usually performed:

1. Observe the outside area of the building for any forced entry during closed hours. If forced entry is observed:
    a. Report this to police and store management immediately.
    b. Do not enter the building; wait until the police arrive.
    c. Do not touch anything at the point of entry.

2. Unlock the store entrance and turn off the alarm system. Do not ask friends to help you open the store.

3. Do not admit any unauthorized people into store.

4. Lock the entrance and proceed with other assigned activities such as:
    a. Turn off the security lights.
    b. Turn on the operational lights.
    c. Adjust the thermostat.
    d. Observe the inside of the store for any forced entry.

        --Check windows and other doors.
        --Check warehouse windows and doors.

5. Proceed to the department opening activities.

6. Open the employee entrance at the time established by the manager.

STUDENT SELF-CHECK I

OPENING THE STORE

Directions: On a separate sheet of paper, place the following store opening activities in the order which you would perform them. If any of listed the activities are ones that you would not do, leave them out. You will be graded according to the procedure established by your instructor.

--Open the employee entrance at the time established by manager/owner.
--Adjust the thermostat.
--Observe the inside of store for forced entry.
--Check the windows and doors in the store and warehouse.
--Admit friends and customers into the store.
--Observe the outside area of the building for any forced entry during closed hours.
--Unlock the store entrance.
--Turn off the alarm system.
--Lock the entrance and proceed with other assigned activities.
--Turn off the security lights.
--Turn on the operational lights.
--Proceed to the department opening activities.

INSTRUCTION SHEET II

PREPARING THE DEPARTMENT FOR DAILY BUSINESS

A salesperson in a retail establishment is expected to assist in the activities that are necessary for preparing the department for a business day. These activities include:

1. Obtain change fund from designated store employee, and place it, in the cash drawer.

2. Survey the department to assure that all merchandise is properly displayed.

3. Compile a list of items that are needed in the department.

4. Perform housekeeping activities:

   a. Straighten the merchandise.
   b. Replace the missing price tickets.
   c. Clean the glass surfaces of display cases.
   d. Remove the dust covers from merchandise.
   e. Pick up any observed trash and properly dispose of it.
   f. Remove any soiled and damaged merchandise and signs from displays.
   g. Check to determine that the department floors are clean and totally free of trash.
   h. Remove any empty hangers from clothing racks.
   i. Remove any litter, stocking/shopping carts, and boxes from aisles.
   j. Clean and straighten all counter tops.
   k. Clean the fitting rooms.
   l. Check to determine that the wrapping desk is orderly and free of litter.
   m. Straighten all under-the-counter areas.
   n. Dust, clean and straighten each free-standing display.
   o. Check signs to determine that each is clean and fresh.
   p. Replace price tags if any are missing from the merchandise.
   q. Remove and store signs, sign holders, and display fixtures that are not being used.
   r. Observe and note any displays that need to be restocked or dismantled.
   s. Check to determine that the department check-out area is neat and clean.
   t. Restock the supply of bags, wrapping paper, and business forms if necessary.
   u. After completing each of the department opening activities. Ask your department manager if there are any other ones that need to be done.

INSTRUCTION SHEET II, (page 2)

Case Situation

The time is 8:30 a.m. The store opens at 9:00. Joe and Alice arrive at the time clock, both punch in and Joe says "Alice, how did your jewelry department do yesterday during the 20% off special sale?" "Joe, we had a fantastic day; we sold a large volume of merchandise, but I have a lot of work to do before opening, so, I'll be seeing you." "Hey, not so fast; we have just started to talk." "I know, Joe, but I have to get to the department to do the housekeeping activities before the doors open today." "Yes, I know, Alice; the sporting goods department needs the same attention. Well, see you at lunch."

As Alice enters the elevator to get to the second floor jewelry department, Joe, thinking to himself says, "I wonder if she has the same tasks to do as I."

"Why must customers always mess up the displays in the department? Oh well, Mr. Allen, my manager, said that one of my jobs every morning is to tidy up all of the displays."

"He said that I should inspect each display prop and fixture every morning and do the following activities if I see that they are needed":

--I carry a feather duster as I inspect the displays and dust each prop and the merchandise on them.

--I inspect all glass surfaces and I remove finger prints or any other dirt smudges that are on the surfaces. I get the glass cleaner and paper towels and thoroughly clean.

--I check each of the display props and fixtures and write the names and prices of the merchandise that are low in stock so that I can restock them during the day.

--I price mark and restock the props and fixtures after I have prepared the department for opening.

--I also check to see that each item of merchandise is located in its proper place. I sometimes find items from the garden supply department in our sporting goods department. I return these items to the proper department.

--I restack sized merchandise into the correct size category. We carry hunting clothing, such as shirts, and I often find that these have been handled by customers and returned to the wrong size stack.

--I always pull merchandise to the front of the prop or fixture, and as I do this, I make certain that all labels facing the customer are not upside down. I will always remember that Mr. Allen called this "fronting" merchandise.

--During my inspection I spot check the merchandise to be certain that each item is price marked. If I see that some are missing, I price mark them again.

--If I notice that hang tags or labels have come loose from items, I make an effort to replace them.

--Some of our merchandise is packaged in boxes and plastic containers. When I see these items out of the containers, I put them back.

--Our hunting clothing is displayed in dust covers, and if I see that a customer has forgotten to replace the covers, I do it.

One of the first things that Mr. Allen said when I came to work in the department was: "Joe, always remember that customers usually buy only what they see, and it's up to us to help them see what we have to offer"; and, you know, I believe him. There was a time when we were really busy in the department, and the displays were not inspected nor were they cleaned. I remember some of our customers saying later, "I thought that your department had such and such, but I couldn't find it, so I had to go to the store across town to buy it," and, you know, we had the merchandise. That experience hasn't been repeated since. I now fully acknowledge that what Mr. Allen said is true.

One last thing, during the day I always check the displays in the department, and when I see any of the jobs that I have already mentioned need to be done again, I do them.

--During my inspection of the display props and fixtures, I also look to see if any merchandise has fallen on the floor. If I see any, I pick it up, check it to determine that it is neither broken or damaged and if it is not, I put it in its proper location.

--Also during my inspection, I look to be certain that there is no broken or damaged merchandise on the props or fixtures. If I see any, I pull it off the prop or fixture and report this to Mr. Allen.

--In our store there is a cleaning crew that sweeps, scrubs, and waxes our floors. But I always check during the day to be certain that the floors are not wet or dirty because wet floors will cause customers to slip and fall. Paper and other trash can do the same thing, and the presence of floor trash detracts from the displays that I have worked so hard to set up.

STUDENT SELF-CHECK II

PREPARING THE DEPARTMENT FOR DAILY BUSINESS

Directions: You have been asked by your department manager to open the department for daily business. Below are listed activities that are performed in your department. On a separate sheet of paper, write the numbers of those that you would perform. Check your answers with those provided by your instructor.

1. Place the change fund in the cash drawer.
2. Check the merchandise to determine that it is properly displayed.
3. Write a list of items that are needed in the department.
4. Straighten the merchandise that is out of order.
5. Remove the dust covers.
6. Clean the glass surfaces of all display cases.
7. Pick up and dispose of all observed trash on floors and displays.
8. Remove the soiled and damaged merchandise from the displays.
9. Balance the cash register.
10. Check the floors to determine that they are free of trash.
11. Remove any empty hangers from the display racks.
12. Remove all stocking carts, shopping carts, boxes, and stocking tools from customer traffic aisles.
13. Straighten and clean all counter tops.
14. Check the fitting rooms and clean if necessary.
15. Straighten all under-the-counter areas.
16. Dust, clean, and straighten each free-standing display prop.
17. Check all signs for freshness and clean lines and remove those that are out-dated or dirty.
18. Return all out-of-place merchandise.
19. Make a list of the displays that need merchandise or the ones that need to be dismantled.

STUDENT SELF-CHECK II, (page 2)

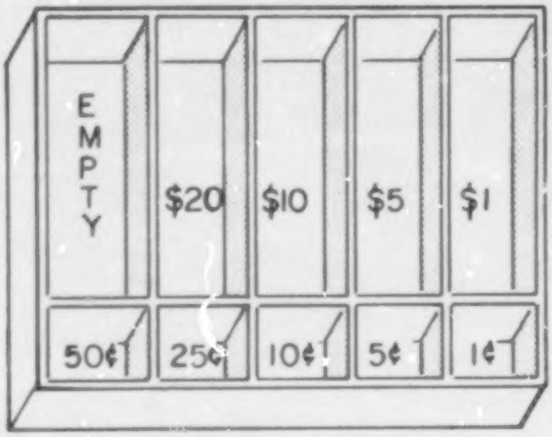
20. Straighten all the check-out area.
21. Check the supply of bags, wrapping paper, and business forms. Restock any needed items.
22. Ask the department manager if other tasks need to be done before the store opens.

INSTRUCTION SHEET III

PREPARING THE CASH REGISTER CASH DRAWER

One of the department opening activities that you may have to perform is to prepare the department cash register cash drawer. This activity is accomplished by performing the following:

1. Obtain the department's change fund from the accounting department's designated employee who is usually the head cashier.
2. Count the change fund and sign the receipt after determining that the amount you received is correct.
3. Place the change fund in the department cash register cash drawer in the following manner:



To avoid making errors when returning change to customers, place the change fund in the correct compartments in the change drawer as shown by the illustration.

- a. Place pennies in the extreme right hand compartment.
- b. Place nickels in the next compartment to the left of the penny compartment.
- c. Place dimes in the compartment to the left of the nickels.
- d. Place quarters in the compartment to the left of the dimes.
- e. Place halves in the compartment to the left of the quarters.
- f. Place one dollar bills in the extreme upper right compartment.
- g. Place five dollar bills in the compartment to the left of the ones.
- h. Place ten dollar bills in the compartment to the left of the fives.
- i. Place twenty dollar bills in the compartment to the left of the tens.
- j. Important: If either one dollar coins or two dollar bills are used in the cash fund, ask your department/store manager how to arrange the cash drawer.

INSTRUCTION SHEET IV

CLOSING THE DEPARTMENT

Each retail establishment will have specific activities for salespeople to perform when the departments are closed at the end of a business day. These activities will not be the same at each store; however, generally you will be expected to do the following:

1. Close out the cash register.
2. Check to determine that security display cases are locked. Lock them if they are not secured. Some examples of security displays are:
   a. Jewelry
   b. Watches
   c. Cameras
3. Write a list of items needed from the stockroom or warehouse.
4. Lock up merchandise that is designated security items.
5. Check the department for fire hazards such as:
   a. Ash trays
   b. Trash baskets
   c. Cigarettes on display cases or shelves
6. Turn off the lights and turn on the security lights.
7. Empty all trash containers into designated containers.
8. Straighten the merchandise and return the out-of-place merchandise to the appropriate display space.
9. Perform general housekeeping activities; i.e.:
   a. Clean glass display cases
   b. Dust
   c. Pick up floor trash
   d. Throw away trash left on counters, shelves, display racks or cases
10. Take the cash receipts from the cash register to the designated store employee.
11. Turn off the electrical equipment.

STUDENT SELF-CHECK III

CLOSING THE DEPARTMENT

Directions: You have learned that there are specific activities that you will do when closing your department at the close of a business day. Below are listed activities that are performed in a retail establishment. On a separate sheet of paper. Write the statements that you would do when closing your department. You will be graded according to the procedure established by your instructor.

1. Hire department employees.
2. Check the department for fire hazards.
3. Lock the security display cases.
4. Straighten the merchandise.
5. Return misplaced merchandise to the appropriate display space.
6. Clear the cash register.
7. Take the cash receipts to the designated store employee.
8. Do general housekeeping activities.
9. Turn off the department lights and turn on the security lights.
10. Lock up all merchandise that is designated as security items.
11. Write a list of items needed by the department from the stockroom or warehouse.
12. Empty all trash containers into designated containers.

INSTRUCTOR'S FINAL CHECKLIST

OPENING AND CLOSING THE STORE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
The student identified the activities with 90% accuracy..	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, OPENING AND CLOSING THE STORE.

Your instructor will give you a list of activities that are performed when opening a store or department and closing a store or department. Identify each according to the written instructions.

RETAILING

OPERATING THE ELECTRONIC CASH REGISTER

INTRODUCTION

As the most universal method of recording sales transactions is by use of the cash register, you as a future salesperson must have the knowledge of and skill in using this machine. In this module, you will learn how to operate the electronic cash register.

DIRECTIONS

Read the objectives below. If you feel you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided an electronic cash register and priced merchandise, correctly register each entry and obtain a correct total.

(2) Provided an electronic cash register and rolls of register tape, change the tape on the register. A clean and clear image should appear on the new tape and it should properly feed.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ about the electronic cash register and how to operate it. your instructor will provide you a reference.

   (or) ____________________

2. LISTEN and OBSERVE as your instructor discusses and demonstrates the electronic cash register that is in your classroom.

3. READ Instruction Sheet I, THE KEYS OF A TYPICAL ELECTRONIC CASH REGISTER.

   (or) ____________________

4. LISTEN and OBSERVE as your instructor discusses and shows the keys of the electronic cash register that is in your classroom.

5. CHECK YOUR KNOWLEDGE of the electronic cash register keys by taking Student Self-Check I, THE KEYS OF AN ELECTRONIC CASH REGISTER.

6. READ Instruction Sheet II, LEARNING THE HOME KEYS OF AN ELECTRONIC CASH REGISTER.

   (or) ____________________

7. READ Instruction Sheet III, LEARNING THE THUMB GROUP OF KEYS.

   (or) ____________________

8. READ Instruction Sheet IV, LEARNING THE SECOND FINGER GROUP OF KEYS.

   (or) ____________________

9. READ Instruction Sheet V, LEARNING THE INDEX FINGER GROUP OF KEYS.

   (or) ____________________

10. READ Instruction Sheet VI, LEARNING THE THIRD FINGER GROUP OF KEYS.

    (or) ____________________

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES, (page 2)

11. CHECK YOUR KNOWLEDGE of the touch system by taking Student Self-Check II, USING THE TOUCH SYSTEM ON AN ELECTRONIC CASH REGISTER.

12. LISTEN and OBSERVE as your instructor discusses and demonstrates how to use the transaction keys on the cash register in your classroom.

13. PRACTICE ringing up merchandise and transactions on the electronic cash register in your classroom. your instructor will provide you with practice exercises.

14. READ Instruction Sheet, CHANGING THE CASH REGISTER RECEIPT TAPE.

    (or)____

15. LISTEN and OBSERVE as your instructor discusses and demonstrates how to change the cash register receipt tape on the electronic cash register in your classroom.

16. PRACTICE changing the tape on the electronic cash register in your classroom.

17. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

INSTRUCTION SHEET I

THE KEYS OF A TYPICAL ELECTRONIC CASH REGISTER

The keyboard of electronic cash registers will be different depending on the brand and design; however, there are usually basic keys which perform specific operations. You will want to familiarize yourself with the keys of the cash register in your classroom.

The usual keys and the transactions which they perform are as follows:

Amount keys -- the numbered keys which are depressed to record the cost of merchandise.

Department keys -- the keys which are depressed to record the sale of an item or items into a specific department.

Electronic cash registers have department keys. Examine the cash register in your classroom to familiarize yourself with the department keys on it:

Transaction keys -- a group of keys which are depressed to perform specific functions.

Paid-out key -- a key that is depressed to record monies (transactions) which are paid to vendors.

Charge key -- a key that is depressed to record the amount of a customer's charged merchandise.

Error correction key -- a key that is depressed to correct entry errors, if the error is detected before another entry is made.

Void key -- a key that is depressed to correct an incorrect amount and department entry.

Clear key -- a key that is depressed to remove an incorrect entry before it is endorsed into a department.

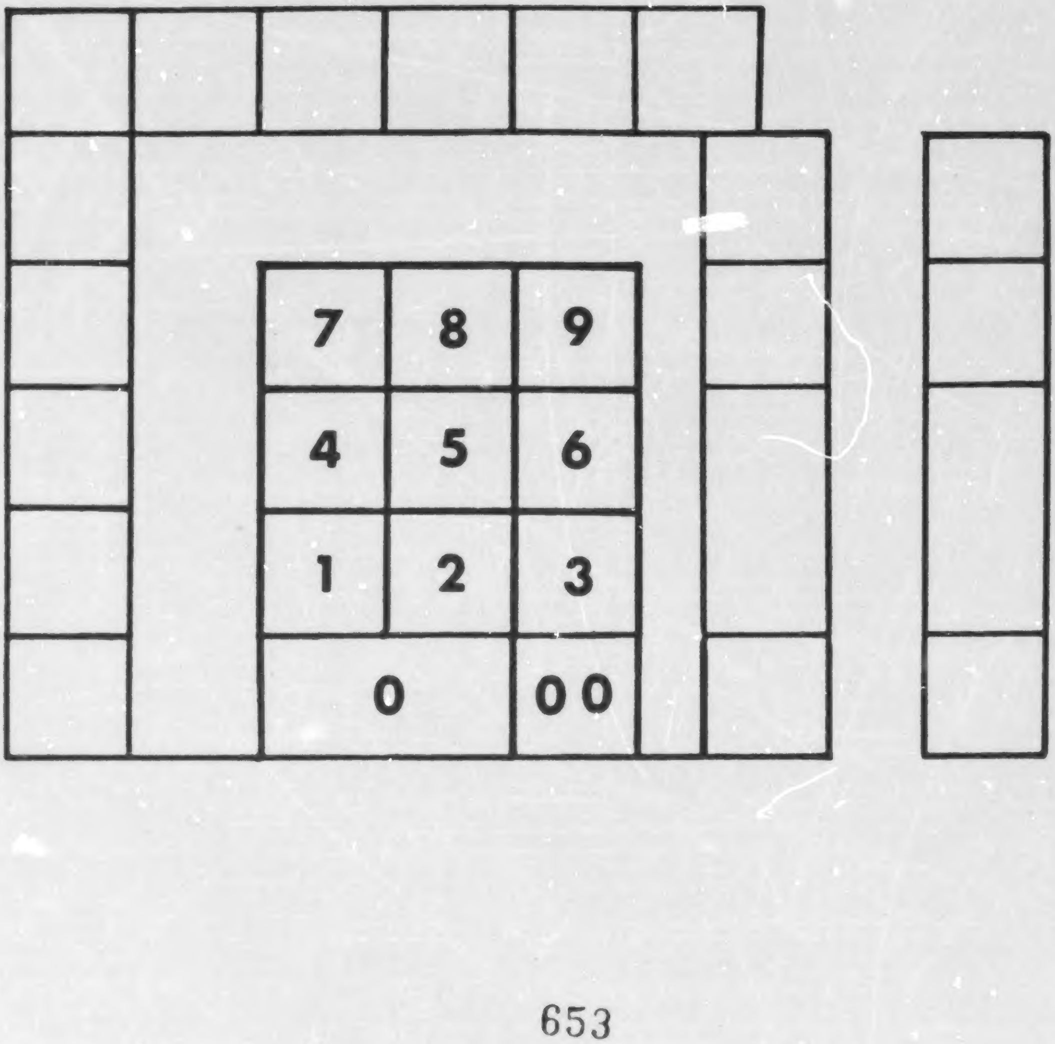
Split pricing calculation key -- a key that is depressed to perform multiplication and split pricing calculations.

Amount tendered key -- a key that is depressed to record the amount of money given the cashier by the customer.

Checks tendered key -- a key that is depressed to get a subtotal reading of an order of merchandise.

INSTRUCTION SHEET I, (page 2)

ILLUSTRATION OF ELECTRONIC CASH REGISTER KEYBOARD


7
8
9
4
5
6
1
2
3
0
00

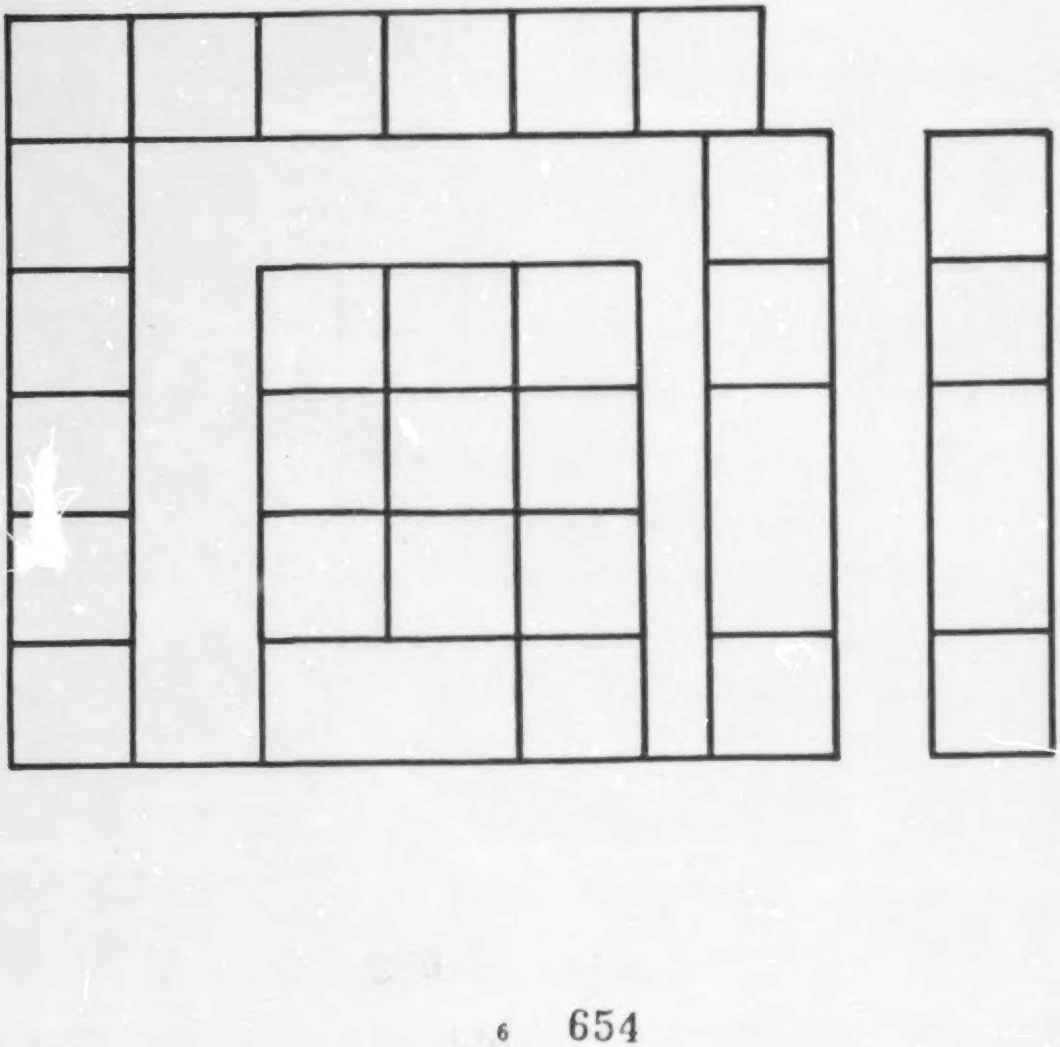
STUDENT SELF-CHECK I

THE KEYS OF THE ELECTRONIC CASH REGISTER

Directions: The following diagram illustrates the keyboard of an electronic cash register.

Label the keys of this illustration with the titles which are on the electronic cash register in your classroom, or should this illustration not be suitable for labeling like the one in your classroom, draw a diagram suited to yours and then label the keys.

Check your diagram with the keyboard in your classroom.



INSTRUCTION SHEET II

LEARNING THE HOME KEYS OF AN ELECTRONIC CASH REGISTER

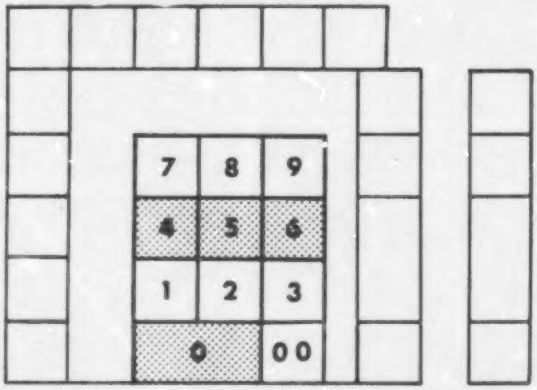
As a salesperson you will be ringing up many orders of merchandise during a business day. To prevent check-out tie-ups and to rapidly serve the customer you will have to be able to ring up orders rapidly. If you learn a system that will help you ring up orders without having to look at the cash register keyboard, you will be able to perform this task effectively and efficiently with a minimum of errors.

The TOUCH SYSTEM is one such method that will help you.

To learn how to use the touch system you must learn what fingers operate the keys of the cash register. You must also learn the home keys, those from which the other keys are depressed.

THE HOME KEYS OF AN ELECTRONIC CASH REGISTER ARE:
(See illustration on page 2)

THUMB on the 0 key
INDEX FINGER on the 4 key
MIDDLE FINGER on the 5 key
THIRD FINGER on the 6 key
LITTLE FINGER on the DEPARTMENT key



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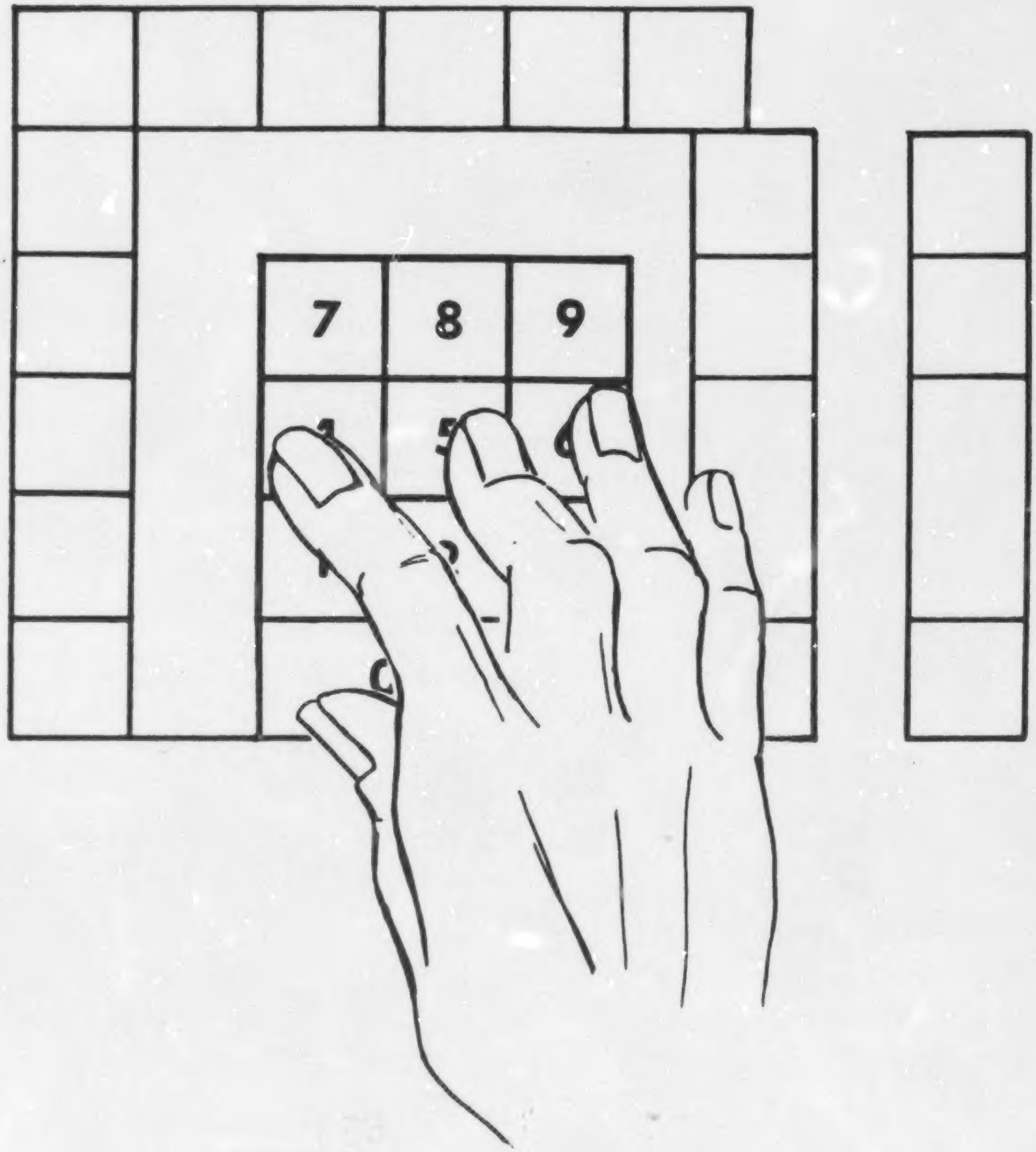
HAND POSITION FOR HOME KEYS



PRACTICE EXERCISES

Using the electronic cash register in your classroom, practice the following exercises:

--Keep fingers on home keys.
--Thumb over the 0.
--Index finger over 4.
--Middle finger over 5.
--Ring finger over 6.
--Make an effort not to look at keyboard.

Enter the following amounts depressing the DEPARTMENT KEY after entering each amount.

45
65
40
54
46
60

56
04
55
44
06
64

40
05
66
60
54
456

400
650
666
465
546
654

466
555
600
455
656

Practice these entries until you feel that you can depress each home key without looking at the keyboard.

INSTRUCTION SHEET III

LEARNING THE THUMB GROUP OF KEYS

Your THUMB is used to enter one number - the 0.

You must enter all 0's on the electronic cash register. For example if an item of merchandise cost .04 or .40 you must enter each zero by depressing the 0 key. The electronic cash register will not automatically register zeros.

Place your fingers on the home keys and enter the following amounts, depressing the department key following each entry.

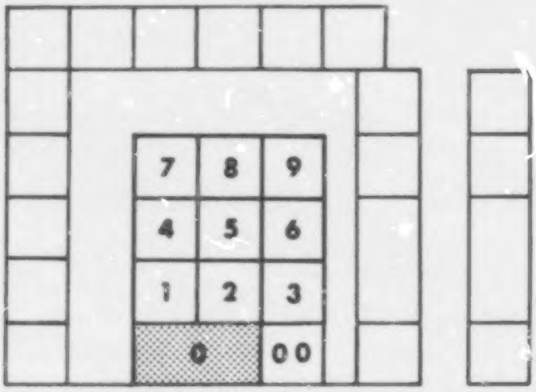
.40
.50
.60

400
60
50

40
50
60

40
500
50

60
40
600



INSTRUCTION SHEET IV

LEARNING THE SECOND FINGER GROUP OF KEYS

Your middle finger is used to depress three keys: 2, 5, 8.

Place your hand on the cash register keyboard in the home position. Without looking at the keyboard, depress the 5 and 8 key with your middle finger.

Press the department key to enter the amount.

You should not see 58¢ department on the receipt tape. Always check the receipt tape if you have a question concerning an entry.

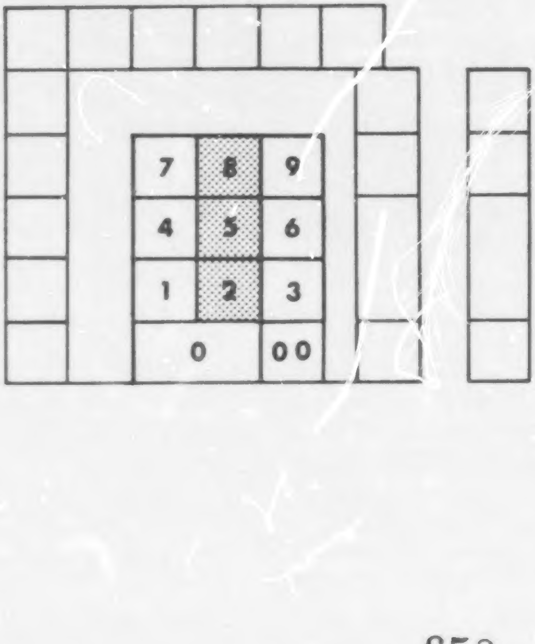
Enter the following numbers on your cash register:

28
85
52
22
82

55
88
82
75
58

28
25
58
82
88

52
28
55
85
22



INSTRUCTION SHEET V

LEARNING THE INDEX FINGER GROUP OF KEYS

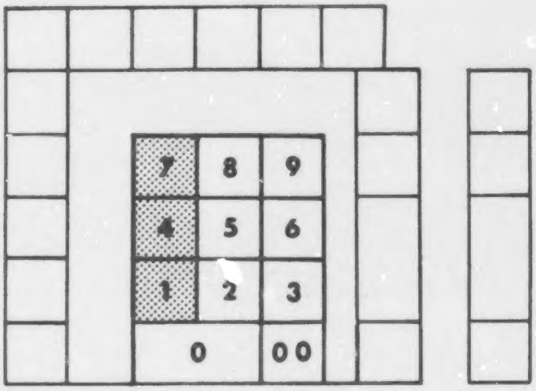
Your index finger is used to depress three keys: 1, 4, and 7.

Place your hand on the home key positions and without looking at the keyboard, depress 1, 4, and 7 with your index finger. Press the department key with your little finger.

Look at the receipt tape. If you see 147 department on it you have correctly used the index finger group of keys.

For practice, enter the following numbers on your cash register:

71 dept.	17 dept.	71 dept.	77 dept.	44 dept.
47 dept.	74 dept.	44 dept.	14 dept.	47 dept.
14 dept.	11 dept.	74 dept.	74 dept.	41 dept.
41 dept.	47 dept.	41 dept.	14 dept.	17 dept.
1.73 Total	1.49 Total	2.30 Total	1.79 Total	1.49 Total



INSTRUCTION SHEET VI

LEARNING THE THIRD FINGER GROUP OF KEYS

Your third or ring finger is used to depress three keys: 3, 6, and 9.

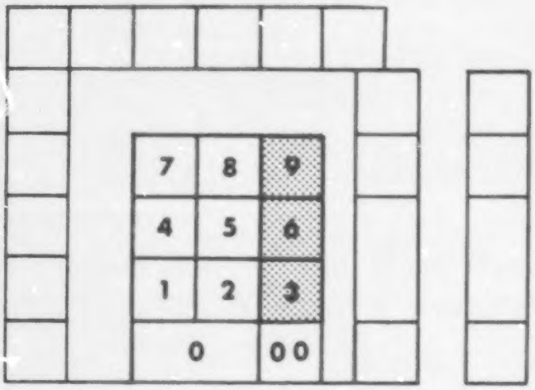
Place your hand on the keyboard in the home key postion and without looking at the keyboard depress 369 Grocery.

Check the receipt tape to see that 369 GR appears on it.

For practice enter the following numbers on the cash register with your third finger. Remember to depress the grocery key to register each entry.

36 Dept.	33 Dept.	66 Dept.	39 Dept.
93 Dept.	69 Dept.	36 Dept.	96 Dept.
66 Dept.	99 Dept.	93 Dept.	33 Dept.
39 Dept.	63 Dept.	69 Dept.	63 Dept.
96 Dept.	39 Dept.	99 Dept.	66 Dept.
3.30 Total	3.03 Total	3.63 Total	2.97 Total

Practice these exercises until you feel that you can depress the correct keys with your third or ring finger without looking at the keyboard.



STUDENT SELF-CHECK II

Directions: USING THE TOUCH SYSTEM ON A ELECTRONIC CASH REGISTER

The following exercises will help you check your progress.

Enter each of the columns of figures into your cash register. Subtotal each column of figures, enter the Amount of Cash Tendered and check to see that the amount of change is the same as those printed on this self-check.

Repeat any column if your subtotal does not agree with the one that appears on the self-check column.

(1)		(2)		(3)		(4)	Dept.
$ .81	Dept.	$ .12	Dept.	$3.41	Dept.	$ .24	Dept.
.59	Dept.	.31	Dept.	1.49	Dept.	.63	Dept.
.15	Dept.	.42	Dept.	.26	Dept.	.72	Dept.
.97	Dept.	.53	Dept.	.81	Dept.	.19	Dept.
.61	Dept.	.74	Dept.	.49	Dept.	.11	Dept.
.17	Dept.	.85	Dept.	.18	Dept.	1.35	Dept.
.68	Dept.	.58	Dept.	.38	Dept.	.27	Dept.
.86	Dept.	.36	Dept.	.73	Dept.	.51	Dept.
1.00	Dept.	.50	Dept.	.27	Dept.	.39	Dept.
$5.84	Subtotal	$4.41	Subtotal	1.37	Dept.	.53	Dept.
$8.79	Cash tendered	$7.41	Cash tendered	.04	Dept.	.38	Dept.
$2.95	Change	$3.00	Change	.30	Dept.	.21	Dept.
				1.04	Dept.	4.61	Dept.
				$10.77	Subtotal	$10.14	Subtotal
				$15.00	Cash tendered	$11.00	Cash tendered
				$ 4.23	Change	$ .86	Change

INSTRUCTION SHEET VII

CHANGING THE CASH REGISTER RECEIPT TAPE

The cash register receipt tape must be changed when a color streak begins to appear on it. This streak indicates that the tape is nearing the end of the roll. As customers should always be given complete receipts, the tape should be changed immediately after the total of an order or transaction is complete after the streak appears.

The steps in changing cash register receipt tapes are different. Often the instructions will be attached to the cash register. Check you register to see if the instructions are on it. If they are not, ask you instructor for a copy of the instructions.

Read the instructions and insert a new receipt tape. Should you have difficulty, ask your instructor for help.

INSTRUCTOR'S FINAL CHECKLIST

OPERATING THE ELECTRONIC CASH REGISTER

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) In the process of operating the electronic cash register, the student completed the following.				
a. When totaling a list of entries on the cash register, the student:				
(1) Entered each amount correctly using the correct home key finger	[ ]	[ ]	[ ]	[ ]
(2) Used the grocery department or largest department key to enter each amount	[ ]	[ ]	[ ]	[ ]
(3) Registered a correct deal	[ ]	[ ]	[ ]	[ ]
b. When totaling a list of entries, including departments, on the cash register,				
(1) Entered each amount correctly using the correct home key finger	[ ]	[ ]	[ ]	[ ]
(2) Entered each item on the correct department key using the correct home key finger	[ ]	[ ]	[ ]	[ ]
(3) Registered a correct total	[ ]	[ ]	[ ]	[ ]
c. When registering entries, including amount, department, and transaction keys, the student:				
(1) Entered the correct amounts using the correct transaction key	[ ]	[ ]	[ ]	[ ]
(2) Used the correct forms to record the transactions if the register did not have the transaction key	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
d. When registering entries and finding change, the student:				
(1) Entered the correct amounts using the correct department and taxable item keys	[ ]	[ ]	[ ]	[ ]
(2) Registered a correct subtotal	[ ]	[ ]	[ ]	[ ]
(3) Entered the correct amount of cash tender on the correct transaction key	[ ]	[ ]	[ ]	[ ]
(4) Registered the correct amount of change balance due	[ ]	[ ]	[ ]	[ ]
(2) When changing the cash register tape, the student:				
a. Correctly threaded the receipt tape into the cash register	[ ]	[ ]	[ ]	[ ]
b. Checked to determine that the register receipt tape fed the printer properly	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, OPERATING THE ELECTRONIC CASH REGISTER.

(1) Your instructor will provide you an electronic cash register and orders of merchandise. Ring up the orders of merchandise.

(2) Your instructor will provide you with an electronic cash register that is out of customer receipt tape and a new tape. Put the new roll of tape into the cash register.

RETAILING

CALCULATING SALES TAX

INTRODUCTION

Many states place an additional charge on merchandise sold in retail stores. This additional charge is known as a sales tax. As a salesperson, it is important for you to know how to determine the appropriate amount of sales tax. In this module, you will learn how to determine sales tax by using a sales tax chart and by computing sales tax by multiplication.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided total amounts of purchases and a sales tax chart, find the correct amount of sales tax. All answers must be correct.

(2) Provided total amounts of purchases, find the amount of sales tax by using multiplication. All answers must be correct.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART.

   (or) ____________________

2. LISTEN and OBSERVE as your instructor discusses and demonstrates how to calculate sales tax.

   (or) ____________________

3. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART.

4. READ Instruction Sheet II, FIGURING SALES TAX BY MULTIPLICATION.

   (or) ____________________

5. CHECK YOUR KNOWLEDGE by completing Student Self-Check II, FIGURING SALES TAX BY MULTIPLICATION.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART

Using a sales tax chart is not a complicated process. Follow the steps listed below. (Your instructor will give you a copy of the sales tax chart.)

(1) Find the total of the customer's purchase, whether by hand, on a sales ticket, or by pressing the taxable total key on a manual cash register.

(2) Look at the sales tax chart and read down the column of figures entitled "Amount of Sale," until you come to the total. If the taxable total does not appear on the tax chart, locate the two amounts that it comes between.

(3) Reading from left to right, locate the correct amount of tax which is listed under the column entitled, Tax.

Example 1

You have finished ringing all the items of an order. You have depressed the taxable total key, and in the indication window, you read $25.95. Look at the tax chart and read down the column of figures entitled "Amount of Sale." When you come to the amounts nearest $25.95, you cannot find the exact amount. Now, find the two amounts that $25.95 is nearest, which on the chart is $25.90-26.09, reading from left to right. Move to the tax column and read the amount of tax, which is $1.30. You would now ring $1.30 into the cash register using the amount keys and the tax key. You would depress the total key to find the total of the customer's purchase.

Example 2

You have totaled your sales ticket or sales slip and have a subtotal of $45.90. Look at the tax chart and read down the column of figures entitled "Amount of Sale," until you come to $45.90. Now, reading from left to right, go to the column entitled, Tax. There you will find $2.30. You place $2.30 on your sales ticket or sales slip where the Tax is located and find the total of the customer's purchase.

STUDENT SELF-CHECK I

READING AND USING THE STATE OF KENTUCKY'S 5% SALES TAX COLLECTION CHART

Directions: Find the amount of sales tax that should be added to the customer's purchase by using a sales tax chart. Ask your instructor for a copy of the sales tax chart. Write your answers on a seperate sheet of paper. Check your answers according to the procedures established by your instructor.

Amount of Purchase	Amount of Tax
(1) 5.95	
(2) 15.90	
(3) 29.75	
(4) 33.30	
(5) 37.55	
(6) 49.75	
(7) 57.90	
(8) 77.75	
(9) 84.50	
(10) 100.00	

INSTRUCTION SHEET II

FIGURING SALES TAX BY MULTIPLICATION

When you do not have a sales tax chart or when the amount of the customer's purchase is over $100.09, you must figure the amount of sales tax by multiplying the amount of the purchase times 5% (.05) (in Kentucky). You round the amount of the sales tax to the nearest cent. The amount of sales tax will be different in other states.

Example 1

You have totaled your sales ticket or sales slip and have a subtotal of $125.95. You multiply $125.95 times .05. Your answer should be $6.2975. You round your answer to the nearest cent, which should be $6.30.

Example 2

You have totaled your sales ticket or sales slip and have a subtotal of $11.65. You multiply $11.65 times .05. Your answer should be $.5825. You round your answer to the nearest cent, which should be 58¢.

STUDENT SELF-CHECK II

FIGURING SALES TAX BY MULTIPLICATION

Directions: Find the amount of sales tax that should be added to the customer's purchase by using multiplication. Use 5% as the amount of sales tax. Write your answers on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

Amount of Purchase	Amount of Sales Tax
(1) $119.95	
(2) $ 41.65	
(3) $ 92.75	
(4) $ 93.35	
(5) $ 5.65	
(6) $ 29.55	
(7) $ 36.35	
(8) $135.00	
(9) $ 89.70	
(10) $ 71.65	

INSTRUCTOR'S FINAL CHECKLIST

CALCULATING SALES TAX

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) When using the sales tax chart, the student:				
(a) Found the correct amount of sales tax for $47.65	[ ]	[ ]	[ ]	[ ]
(b) Found the correct amount of sales tax for $98.70	[ ]	[ ]	[ ]	[ ]
(c) Found the correct amount of sales tax for $8.99	[ ]	[ ]	[ ]	[ ]
(2) When using multiplication to find the sales tax, the student:				
(a) Found the correct amount of sales tax for $129.55	[ ]	[ ]	[ ]	[ ]
(b) Found the correct amount of sales tax for $109.75	[ ]	[ ]	[ ]	[ ]
(c) Found the correct amount of sales tax for $112.65	[ ]	[ ]	[ ]	[ ]
(d) found the correct amount of sales tax for $150.00	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. After you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, CALCULATING SALES TAX.

(1) Your instructor will provide you with total amounts of purchases and a Kentucky sales tax chart. Find the correct amount of sales tax.

(2) Your instructor will provide you with total amounts of purchases. Find the correct amount of sales tax for Kentucky by using multiplication.

RETAILING

MAKING CHANGE

INTRODUCTION

Salespeople in retail establishments must be able to make correct change when closing a sale. In this module, you will learn how to do this accurately and efficiently.

DIRECTIONS

Read the objective below. If you think you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given the total purchase price of merchandise and the amount of money given by customers, make the correct change for each of the transactions. All applicable items on the Instructor's Final Checklist must be performed correctly.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ about how to make change. Your instructor will provide a reference.

   (or)____

2. READ Instruction Sheet I, HOW TO MAKE CHANGE.

   (or)____

3. LISTEN and OBSERVE as your instructor discusses and demonstrates how to make change.

   (or)____

4. CHECK YOUR KNOWLEDGE by taking Student Self-Check I, MAKING CHANGE.

5. PRACTICE making change by completing Student Self-Check II, PRACTICE IN MAKING CHANGE.

6. PLAY THE ROLE of a salesperson in a retail establishment and make change for simulated purchases made by a fellow student. USE play money and have the other student pay in larger amounts than the purchase price. After returning the change, CHECK your performance with the steps in Student Self-Check III, CHECKLIST FOR MAKING CHANGE.

7. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

HOW TO MAKE CHANGE

In retail establishments, salespeople must be able to make correct change when closing a sale. Giving less change than is due a customer will irritate him/her. Giving a customer more change than is due will decrease the store's profits. There is no place for error in this transaction.

The following guidelines will help you learn how to make change correctly.

1. Ring and total the customer's purchase on the cash register.

2. State the total cost of the merchandise. For example:

   --"That will be $15.98."
   --"Your total cost is $16.45."

3. When the customer hands you the money, state the amount of money that you receive. For example:

   --"That's $15.98 out of $20.00."
   --"That's $16.45 out of $17.00."

4. Always place the customer's money on the cash register change plate. Do not place the customer's payment into the cash drawer until it is acknowledged that the correct change has been received.

5. As you remove the correct amount of change from the change drawer, silently count up to the total amount of money that your customer has given you, beginning with the total cost of the merchandise. Use the largest available denominations of coins and bills when making change.

6. Return the customer's change by counting it aloud beginning with the total cost of the merchandise and counting up to the amount of money that was given to you.

7. After the customer approves of the amount of change received, remove the money from the cash register change plate and put it in the appropriate section of your cash drawer.

STUDENT SELF-CHECK I

MAKING CHANGE

On a separate sheet of paper, number from 1 to 5. Select the correct answer to the following. Check your answers according to the procedures established by your instructor.

1. The customers order comes to $4.49. He gives you a $10.00 bill in payment. You would say to the customer:
   - a. That will be $4.49.
   - b. That's $10.00 out of $4.49.
   - c. That's $4.49 out of $10.00.
   - d. That's $4.49, not $10.00.

2. You should place the amount the customer gave you on the change plate:
   - a. Because that's the only place you could put it.
   - b. To avoid any misunderstanding concerning the amount given you.
   - c. You shouldn't put it there at all.
   - d. So you can see it as you count the change.

3. Using the figures in Question 1, you would then:
   - a. Start counting with the amount of the purchase and count to the amount given you.
   - b. Start counting with the amount given you and count back to the amount of the purchase.
   - c. Count out $10.00 worth of change, put $4.49 in the drawer and give the customer the rest.
   - d. Ask the customer how much change is due him.

4. After you satisfy yourself that you have the correct change, you should:
   - a. Give it to the customer.
   - b. Count it again as you give it to the customer, this time out loud so that your customer can count along with you.
   - c. Count it again silently because counting aloud tends to confuse the customer.
   - d. Tell the customer to count the change to make sure of the correct amount.

5. To complete the transaction, you should:
   - a. Put the money in the cash-drawer, close the register and say "Thank-you" to the customer.
   - b. Put the money in your pocket.
   - c. Put the money in the cash-drawer and say nothing to the customer.
   - d. Leave the money on the change plate so that your supervisor can see what you've done.

STUDENT SELF-CHECK II

PRACTICE IN MAKING CHANGE

Directions: On a seperate sheet of paper, fill in the blank spaces with the amount of each denomination of coins and bills that you would give as change in the following examples. Check your answers according to the procedures established by your instructor.

	AMOUNT OF THE PURCHASE	Pennies .01	Nickels .05	Dimes .10	Quarters .25	Dollars $1.00	5 Dollars $1.00	10 Dollars $10.00	20 Dollars $20.00	DENOMINATION CUSTOMER GIVES YOU
1.	4.63									5.00
2.	6.97									20.00
3.	10.62									15.00
4.	9.45									20.00
5.	6.19									10.00
6.	4.82									5.00
7.	6.96									20.00
8.	7.02									20.00
9.	9.92									20.00
10.	10.06									50.00
11.	1.98									5.00

STUDENT SELF-CHECK III

CHECKLIST FOR MAKING CHANGE

Directions: In making change, did you complete the following steps?

Yes/No

____ 1. I announced the amount of the purchase and the amount of the money given by the customer.

____ 2. I placed the customer's money on the change plate of the cash register.

____ 3. I counted up from the amount of the purchase to the amount that the customer had given as I returned the correct change.

____ 4. I placed the bill in the cash drawer after the customer indicated that the correct change was received.

____ 5. I gave the customer a sales receipt.

____ 6. I thanked the customer after change was made.

INSTRUCTOR'S FINAL CHECKLIST

MAKING CHANGE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In making change, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Announced the amount of the purchase and the amount of money given by the customer	[ ]	[ ]	[ ]	[ ]
b. Placed the customer's money on the change plate of the cash register	[ ]	[ ]	[ ]	[ ]
c. Counted up from the amount of the purchase to the amount that the customer had given as change was returned	[ ]	[ ]	[ ]	[ ]
d. Placed the bill in the cash register only after the customer indicated that the correct change was received	[ ]	[ ]	[ ]	[ ]
e. Gave the customer a sales receipt	[ ]	[ ]	[ ]	[ ]
f. Thanked the customer after the change was made	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you complete the activity, your instructor will rate your performance using the Instructor's Final Checklist, MAKING CHANGE.

Your instructor will give you the total purchase or merchandise and the amount of money given by customers. Make change for each of the transactions.

RETAILING

ACCEPTING VALID CONSUMER COUPONS

INTRODUCTION

Vendor and store coupons are used by manufacturers and retailers to introduce consumers to new products, to stimulate sales of specific products, and to increase sales. As a salesperson, you must know how to accept only those coupons which are valid. In this module, you will learn how to accept valid consumer coupons.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given vendor and store coupons and an order of merchandise, check the coupons with the order and identify those which are valid.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, KINDS OF CONSUMER COUPONS.

   (or)____

2. LISTEN and OBSERVE as your instructor discusses and demonstrates how to identify the kinds of consumer coupons.

   (or)____

3. CHECK YOUR KNOWLEDGE of the kinds of consumer coupons by taking Student Self-Check I, IDENTIFYING CONSUMER COUPONS. (Your instructor will provide a package of coupons.)

4. READ Instruction Sheet II, ACCEPTING CONSUMER COUPONS.

   (or)____

5. LISTEN as your instructor discusses how to accept valid consumer coupons.

   (or)____

6. CHECK YOUR KNOWLEDGE of accepting consumer coupons by taking Student Self-Check II, IDENTIFYING THE PARTS OF CONSUMER COUPONS. (Your instructor will provide examples of coupons.)

7. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

KINDS OF CONSUMER COUPONS

1. Vendor coupons are given to consumers by manufacturers in order to increase the sale of specific products or to introduce the product to the consumer. These coupons are redeemable at most retail establishments.

2. Store coupons are given to consumers by the retail store to stimulate sales. These coupons are usually distributed to the consumers through newspaper ads, home mailings, in-store customer coupon exchange, or house-to-house deliveries. Store coupons are redeemable only at stores or groups of stores that are specified on the coupon.

STUDENT SELF-CHECK I

IDENTIFYING CONSUMER COUPONS

Directions: Your instructor will provide you with a package of consumer coupons. On a separate sheet of paper, identify those that are store coupons by writing store by the number of the coupon. Identify those that are vendor coupons by writing the word vendor by the number of the coupon. Check your answers according to the procedures established by your instructor.

INSTRUCTION SHEET II

ACCEPTING CONSUMER COUPON

A retail store salesperson must be alert when accepting coupons because of the number and variety that the store may be accepting at a given time. When accepting coupons, you should check four things. Refer to the examples provided by your instructor.

1. Check the expiration date on the coupon (date after which the coupon is not good).
2. Check the limitations stated on the coupon such as "one per customer."
3. Check the merchandise to see if it is the same as stated on the coupon.
4. Check the stated control number, if applicable; example: Limit of 4 with $10.00 order.

STUDENT SELF-CHECK II

IDENTIFYING THE PARTS OF CONSUMER COUPONS

Directions: Examine the following examples of vendor and store coupons and determine the expiration date, the value of the coupon, the product name, the purchase limits, and the amount of required purchase of each one. Write this information in the space provided. Your instructor will provide coupons. Write your answer on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

COUPON 1 COUPON 2

		COUPON 1	COUPON 2
A.	Expiration date	________	________
B.	Value of coupon	________	________
C.	Product name	________	________
D.	Limits of purchase	________	________
E.	Amount of required purchase	________	________

STUDENT SELF-CHECK II, (page 2)

COUPON 3 COUPON 4

	COUPON 3	COUPON 4
A. Expiration date	____________	____________
B. Value of coupon	____________	____________
C. Product name	____________	____________
D. Limits of purchase	____________	____________
E. Amount of required purchase	____________	____________

COUPON 5 COUPON 6

	COUPON 5	COUPON 6
A. Expiration date	____________	____________
B. Value of coupon	____________	____________
C. Product name	____________	____________
D. Limits of purchase	____________	____________
E. Amount of required purchase	____________	____________

INSTRUCTOR'S FINAL CHECKLIST

ACCEPTING VALID CONSUMER COUPONS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
In accepting consumer coupons, the student Identified all valid coupons	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, ACCEPTING VALID CONSUMER COUPONS.

Your instructor will give you an example of an order of merchandise and consumer coupons. Write the word "Acceptable" beside the numbers of the coupons that are valid.

RETAILING

ACCEPTING CUSTOMERS' CHECKS

INTRODUCTION

During a day's business transactions, many checks are presented to the retail establishment in payment for merchandise. A check is a negotiable instrument that is issued in order to transfer funds from one person to another through banks. Retail establishments' employees handle many checks each day and must be able to determine if a check is acceptable. In this module you will learn how to examine checks for acceptability and authorize these checks for payment for merchandise.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given a display of six checks and a "Checks Cashed Slip," examine the checks and list on the slip all of the ones which are acceptable and describe why the others were rejected. Each acceptable check should be listed and each check that is rejected should have a correct written reason for its rejection.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, PARTS OF CHECKS.

   (or) ____________________

2. LISTEN and OBSERVE as your instructor discusses and shows the "Parts Of An Acceptable Check."

3. CHECK YOUR KNOWLEDGE of the parts of the check by completing Student Self-Check I, PARTS OF A CHECK.

4. READ Instruction Sheet II, TYPES OF CHECKS.

   (or) ____________________

5. READ Instruction Sheet III, EXAMINING CHECKS FOR ACCEPTABILITY.

   (or) ____________________

6. READ Instruction Sheet IV, CHECK CASHING PROCEDURES.

   (or) ____________________

7. LISTEN and OBSERVE as your instructor discusses and demonstrates "Check Cashing Procedures."

   (or) ____________________

8. CHECK YOUR KNOWLEDGE of acceptable and unacceptable checks by completing Student Self-Check II, ACCEPTABLE AND UNACCEPTABLE CHECKS. (Do the practice exercises.)

9. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

PARTS OF CHECKS

Cashing checks is a very important part of your job when working in a retail establishment. More than ever before, customers are issuing checks. It is your duty to obtain ALL the necessary information in order to abide by your store's rules on accepting checks.

You, as an employee, will usually not turn down a check. You obtain the required information, and if the check is to be refused, let the person in charge handle this matter. Granted, you cannot catch all the bad check artists and forgers, but by staying ALERT, you can minimize your store's losses. You cannot be responsible for checks returned and stamped "Insufficient Funds," however, by being ALERT, you can help the management by having all the information required so that more of these checks can be made good. Many checks are returned because they were made out incorrectly. It is your duty to notice these errors when the check is presented.

Each store will have its own system for check approval. Listed below are twelve rules and procedures generally followed in the Retail Industry.

A sample check is shown on the next page.

1. Name and Address - Personal checks should have the check writer's name and complete address pre-printed. Usually only local addresses are acceptable.

2. Phone Number - If the phone number is printed on the check, ask the customer if it is a present number. If not, cross out and fill in the correct phone number. If the check has no phone number, ask the customer for it.

3. Bank Identification Numbers - These numbers must be printed on the check. Usually the numbers are near the upper right corner. These numbers are assigned to the bank by the Federal Reserve System; every bank has a different one.

4. Date - The check should be dated the day the purchases are made. Do not accept post-dated checks (future dated) for they are invalid. In addition, never accept a check that has been dated more than 30 days.

5. "Pay to the Order of" (Payee) - Make certain the check is made to your store. If the line is blank, put in your store's name. If the check is written to the person presenting the check, the person's name will appear here. Ask for identification and have them endorse the check on the back, if the store manager will allow three-party check to be cashed.

INSTRUCTION SHEET I, (page 2)

6. Money Amounts - These two amounts, numerical and written, must be the same. If not, show the mistake to your customer, and politely ask for another check. If the check must be altered, it must be done only by the person who wrote it, and the alteration must be made properly. NOTE: If your store allows any alterations on a check, only the check writer can make minor changes and must initial changes.

7. Bank Name and Address - All checks must have a bank name and address preprinted, usually in the lower left or upper left corner.

8. MICR Encoding Number - This number is pre-printed and appears at the bottom of the check. It is used by the bank's electronic check-processing equipment to identify the bank and the account number of the party writing the check.

9. Payer's Signature - This is the personal signature of the person writing the check. This signature must be complete and legible. On personal checks written to the store, this signature must match the pre-printed name at the top of the check.

10. Check Number - This number is preprinted on the check for the purpose of assisting the payer maintain a record of checks written.

11. Payer's Account Number - This number is preprinted and is used by the payer's bank for identifying the payer.

12. Reason For - This space is for the payer to write the purpose of the check.

STUDENT SELF-CHECK I

PARTS OF A CHECK

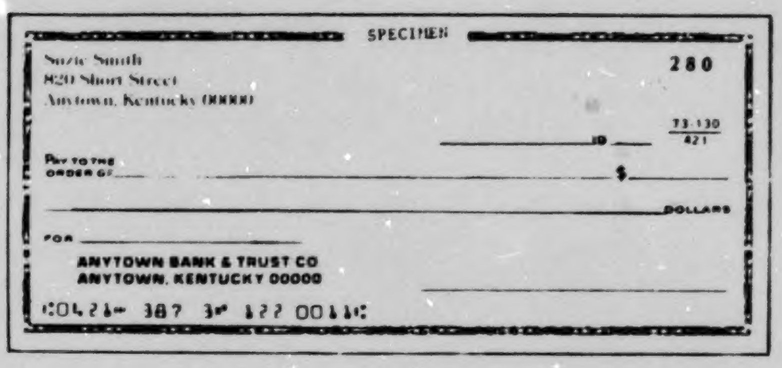
Directions: On a separate sheet of paper, number your paper from 1 to 13. Write the correct letter from the list below beside the number. Check your answers according to the procedures established by your instructor.

1. A consecutive number that is printed on the check by the bank or is written by the payer.
2. A number used to identify the bank.
3. The current day and year the check is written.
4. The amount of the check written in figures.
5. The written signature of the person who is writing the check.
6. The account number which the bank has assigned to the payer.
7. A line of special printing along the bottom of the check which is used by the bank's electronic check-processing equipment to process the check.
8. The name and address of the bank on which the check is drawn.
9. The amount for which the check has been drawn, written in script.
10. The name of the person to whom the check is written.
11. The imprinted name and address of the person who is writing the check.
12. The signature of the person to whom the check is written.
13. The purpose of the check.

a. Payer's name and address
b. Amount of check written in script
c. MICR encoding number
d. Payer's signature
e. Date
f. Check number
g. Bank identification number
h. Numerical amount of check
i. Payer's account number
j. Payer's bank name
k. Payee
l. Endorsement
m. Reason for

STUDENT SELF-CHECK I, (page 2)

Directions: Using the thirteen words listed on the previous page, label the parts of the following check on a separate sheet of paper by using the letters assigned to the words. Check your answers according to the procedures established by your instructor.



SPECIMEN

Suzie Smith
820 Short Street
Anytown, Kentucky 00000

280

19 ____

73-130
421

PAY TO THE
ORDER OF ____ $ ____

____ DOLLARS

FOR ____

ANYTOWN BANK & TRUST CO
ANYTOWN, KENTUCKY 00000

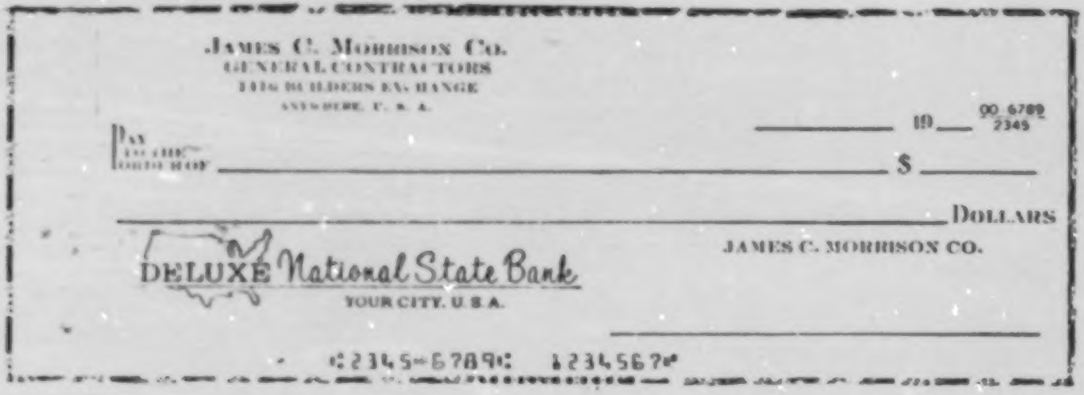
⑆0421⑆ 387 3⑈ 122 0011⑆

INSTRUCTION SHEET II

TYPES OF CHECKS

Working in a retail establishment, you will be presented with many types of checks; you should become familiar with each. The following illustrations will give you an idea of the three main types of checks and the purpose of each. Study these illustrations until you think you are able to recognize them.

A company writes this kind of check.



JAMES C. MORRISON CO.
GENERAL CONTRACTORS
1116 BUILDERS EXCHANGE
ANYWHERE, U. S. A.

19___ 90-6789/2345

PAY TO THE ORDER OF __________ $ ______

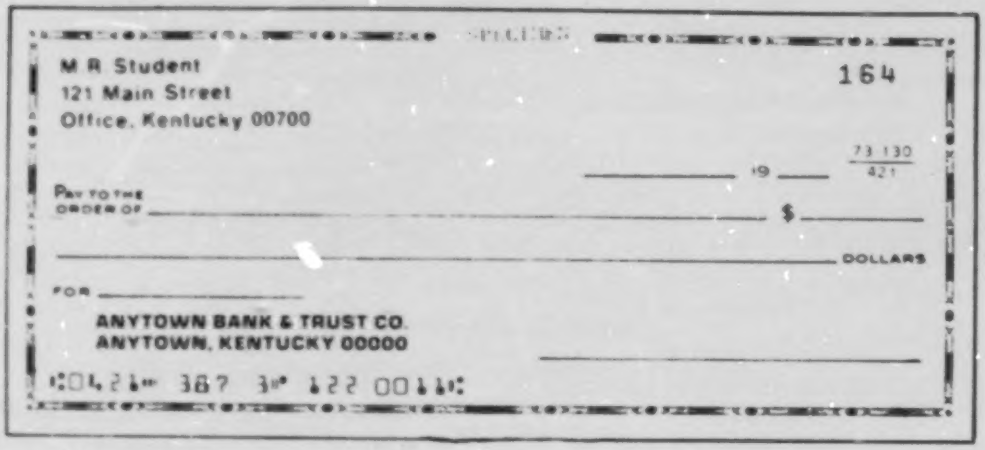
__________ DOLLARS

JAMES C. MORRISON CO.

DELUXE National State Bank
YOUR CITY, U.S.A.

⑆2345⑈6789⑆ 1234567⑈

An individual writes this check for merchandise purchased.



M R Student
121 Main Street
Office, Kentucky 00700

164

19___ 73-130/421

PAY TO THE ORDER OF __________ $ ______

__________ DOLLARS

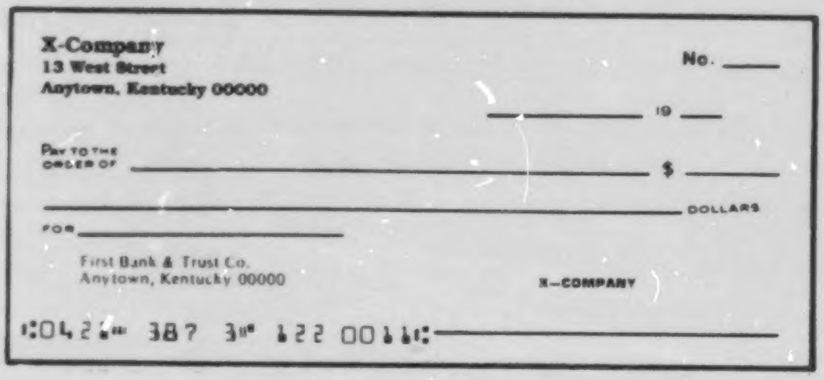
FOR __________

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

⑆0421⑈ 387 3⑈ 122 0011⑆

INSTRUCTION SHEET II (page 2)

A company or organization writes this check for services rendered by an employee.



X-Company
13 West Street
Anytown, Kentucky 00000

No. ____

____________ 19 ___

PAY TO THE ORDER OF ______________________ $ ______

______________________________ DOLLARS

FOR ______________

First Bank & Trust Co.
Anytown, Kentucky 00000

X—COMPANY

⑆0421⑆ 387 3⑈ 122 0011⑆ ______________

Business check. A check authorizing a bank to withdraw funds from an account which belongs to a business - not to an individual. Some business checks specify that two signatures are necessary to cash the check - the president and the treasurer of the company, for example. Be sure that all the required signatures appear. Also, be cautious in accepting checks on which the company name is written or stamped rather than imprinted by the bank. This might indicate a financially unsound business or no business at all. If you refuse such a business check, you may offer to consider the individual's personal check.

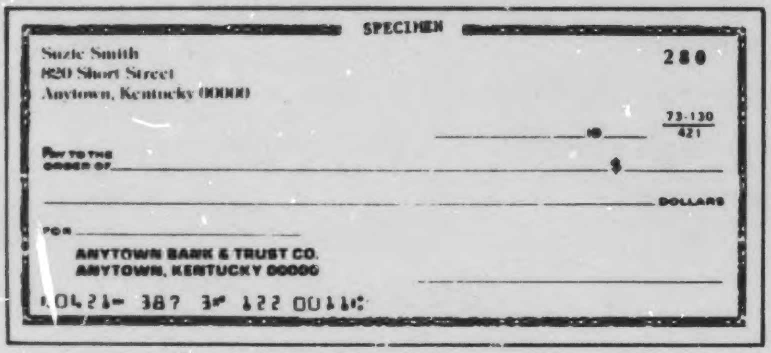
Traveler's check. A special kind of check often used as a convenience by people traveling because it will be accepted almost anywhere in the world. A traveler's check requires two signatures - one written when the check is purchased and one when it is cashed. When you cash a traveler's check, have the person counter sign it in the lower-left corner in your presence. (A Countersignature is a second signature on a previously signed document.) If the countersignature agrees with the signature in the upper left, you may accept the check without risk or loss. If the check has already been countersigned, have it signed again on the back so you can compare all three signatures for agreement.

INSTRUCTION SHEET III

EXAMINING CHECKS FOR ACCEPTABILITY

You, as a salesperson in a retail establishment, will be paid by customers with checks. Checks are a vital part of our everyday business economy. You must know what makes a check acceptable and what makes a check unacceptable if you are to serve both your store and your customers.

Look closely at the check on this page as you read the following:



SPECIMEN

Suzie Smith
820 Short Street
Anytown, Kentucky 00000

280

19

73-130
421

PAY TO THE ORDER OF $

DOLLARS

FOR

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

0421- 387 3 122 0011

When writing a check, your customer should include:

--The present date.

--The name of your store.

--The amount of the check in written numbers.

--The written amount of the check in words. These words must agree with the amount written in numbers.

--The "FOR" line does not have to be completed as this is an option of the customer.

--The signature line must contain the same name of the persons as is imprinted on the check.

Other parts of the check to examine:

--The check should have the name and address of the drawer printed on it. It may also include the drawer's telephone number.

--It should have the A.B.A. transmit number printed on it.

INSTRUCTION SHEET III, (page 2)

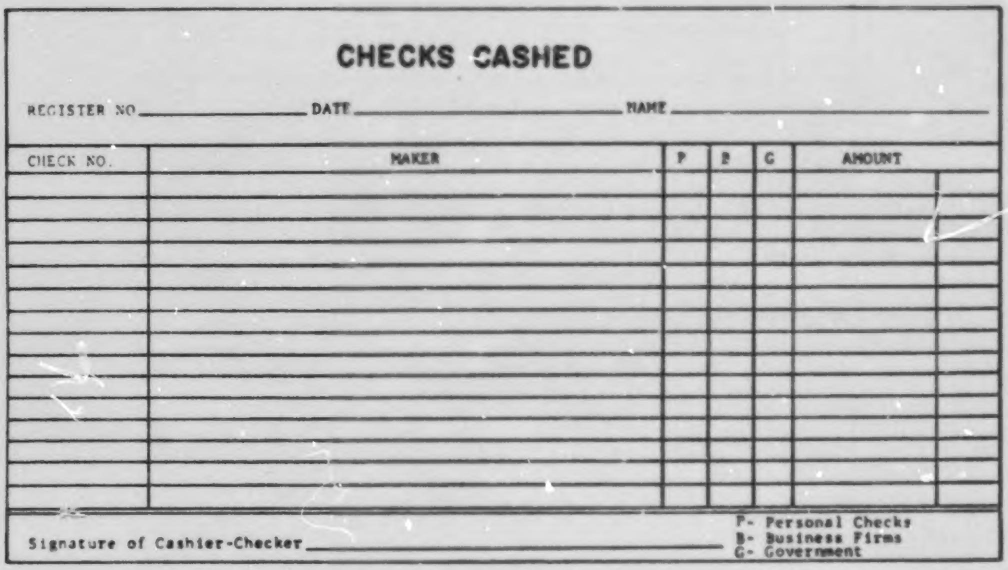
--It should have the name and address of the drawer's bank printed on it.

--It should have the MICR numbers printed on it.

--It should have the drawer's account number printed on it.

--The check may also have a number on it that is for your customer's benefit in keeping up with the number of checks written. This number is not used in cashing a check.

When you are accepting checks for payment of merchandise or for payment on account, always follow your store's policy. If for any reason you question the validity of a check, ask your supervisor.



CHECKS CASHED

REGISTER NO____________ DATE____________________ NAME______________________

CHECK NO.	MAKER	P	B	G	AMOUNT	

Signature of Cashier-Checker____________________________

P- Personal Checks
B- Business Firms
G- Government

INSTRUCTION SHEET IV

CHECK-CASHING PROCEDURES

Although your responsibility for cashing checks depends upon the policies of your store, the following steps are generally taken by a retail establishment when accepting checks in payment for merchandise.

IDENTIFICATION

Know your endorser; obtain proper identification. Listed below are the usual sources of identification.

DRIVER'S LICENSE - Check the following points.

--Be sure the address is local and the same as the one on the check.
--Compare your customer to the description. Such as AGE, COLOR OF EYES, COLOR OF HAIR, HEIGHT, AND WEIGHT. (Use yourself as a guideline regarding height and weight.)
--Compare both signatures, the one on the check with the one on the driver's license. If they are not similar, bring this to the attention of the person in charge.

STORE CHECK CASHING COURTESTY CARDS - Many stores issue a check-cashing courtesy card to qualified customers to aid you in identifying the customer and to expedite cashing checks. Your company will instruct you on how to handle its cards.

BANK CHECK GUARANTEE CARD - The bank listed on the check, (which must be the same as on the Guarantee Card), will guarantee a check to a certain amount. When using this card, be sure to write the card number and bank, check the expiration date.

CREDIT CARDS - (Such as Master Card and VISA.) Be sure to write the card number; check the expiration date.

CHARGE-PLATES - Again, be sure to write the company and card number; check the expiration date.

If the retail establishment employee is satisfied with the ID presented by the customer, the store normally requires the employee's initials on the face of the check in the upper right or left hand corner.

If the retail establishment employee is not satisfied with the ID presented by the customer, the check should either be refused or the manager should be called to see if he/she wishes to approve the check.

INSTRUCTION SHEET IV, (page 2)

POINTS AND PRECAUTIONS TO REMEMBER

--Before accepting a check as payment, obtain all the required information.
--Know your store's procedures for handling checks for large amounts and out of area checks.
--Know your store's procedures for handling Money Orders, Traveler's Checks or County Warrants, Government Checks, Payroll Checks, and Personal Checks.
--Checks that are written in pencil, or rubber stamped, are usually not accepted.
--Your company loses if you accept a forged check.
--Most forgers and bad check artists work during the rush hours.
--If a customer refuses to give any identification, call for the person in charge.
--Bring to the attention of the person in charge, any check having space for two signatures but having only one.
--All checks should be kept in a designated area, usually in the cash drawer under the till.
--Some stores will have you list each check on the Checkers Balance Sheet; others may let you turn in one total on all checks, or turn in the checks without a total.

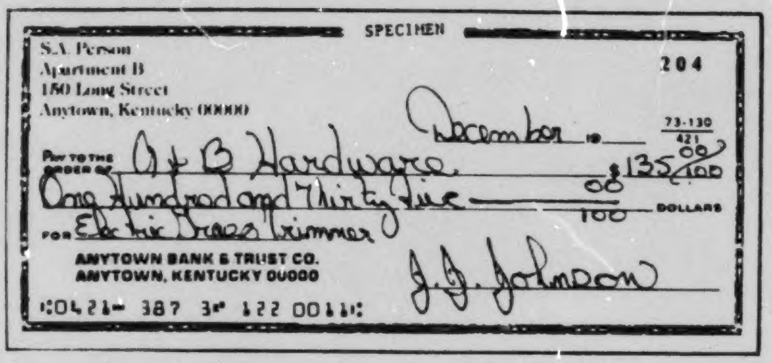
The form used for listing the checks may be titled "Checks Cashed" like the one shown below:

STUDENT SELF-CHECK II

ACCEPTABLE AND UNACCEPTABLE CHECKS

Directions: Number a separate sheet of paper from 1 to 3. Review the three following checks. If the checks are "acceptable" write "acceptable" bside its number. If it is "unacceptable" write "unacceptable" beside its number and state why it is "unacceptable." Your work for A & B Hardware and the date is December 12, 1984.

1.



SPECIMEN

S.A. Person
Apartment B
150 Long Street
Anytown, Kentucky 00000

204

December 19

73-130
421

PAY TO THE ORDER OF A & B Hardware $135 00/100

One Hundred and Thirty Five 00/100 DOLLARS

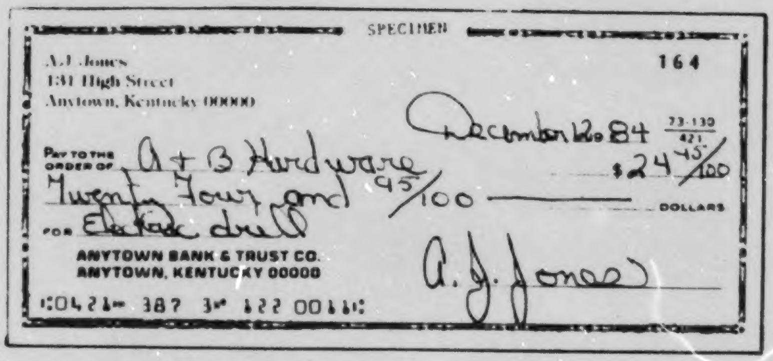
FOR Electric Grass Trimmer

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

J. J. Johnson

⑆0421⑈ 387 3⑈ 122 0011⑆

2.



SPECIMEN

A.J. Jones
131 High Street
Anytown, Kentucky 00000

164

December 12, 84

73-130
421

PAY TO THE ORDER OF A & B Hardware $24 45/100

Twenty Four and 45/100 DOLLARS

FOR Electric drill

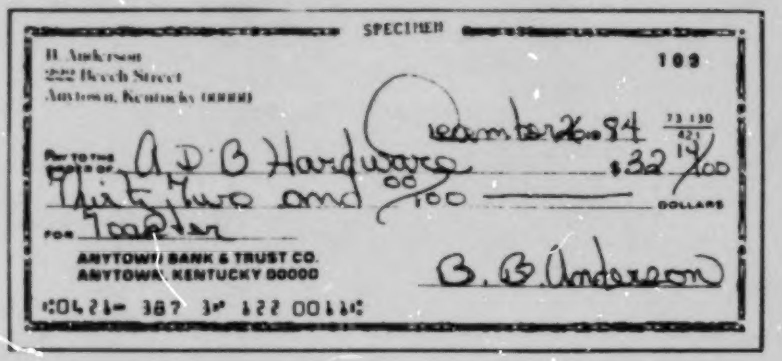
ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

A. J. Jones

⑆0421⑈ 387 3⑈ 122 0011⑆

STUDENT SELF-CHECK II, (page 2)

3.



SPECIMEN

B. Anderson
222 Beech Street
Anytown, Kentucky 00000

109

December 26, 84

73-130/421

PAY TO THE ORDER OF A D B Hardware $32 14/100

Thirty Two and 00/100 DOLLARS

FOR Toaster

ANYTOWN BANK & TRUST CO.
ANYTOWN, KENTUCKY 00000

B. B Anderson

⑆0421⑈ 387 3⑈ 122 0011⑆

INSTRUCTOR'S FINAL CHECKLIST

AUTHORIZING CUSTOMERS' CHECKS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When identifying acceptable checks, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Listed each acceptable check on the Checks Cashed Slip	[ ]	[ ]	[ ]	[ ]
b. Listed each reason for non-acceptable checks	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. After you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, AUTHORIZING CUSTOMERS' CHECKS.

Your instructor will provide you six checks and a "Checks Cashed Slip." List the acceptable checks on the "Checks Cashed Slip" and describe why you rejected the others.

RETAILING

WRITING SALES TRANSACTIONS

INTRODUCTION

Business transactions must be documented (written) if records of them are to be retained by the retail establishment and the customer. There is a saying in business that goes like this, "The sale is not complete until the paper work is finished." In this module, you will learn how to document (write) sales transactions and customers' payments-on-account.

DIRECTIONS

Read the objective below. If you think you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided four customers and sales tickets, write sales transactions for a cash purchase, a charge purchase, a lay-away purchase, and a received-on-account transaction. The tickets must be completed in full with no errors in mathematical computations.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about how to write sales transactions. Your instructor will provide a reference.

   (or) ____

2. READ Instruction Sheet I, THE SALES TICKET.

   (or) ____

3. LISTEN and OBSERVE as your instructor discusses and demonstrates the use of the sales ticket.

   (or) ____

4. READ about how to use the sales ticket for recording cash sales. Your instructor will provide a reference.

   (or) ____

5. READ Instruction Sheet II, USING THE SALES TICKET FOR RECORDING CASH SALES.

   (or) ____

6. LISTEN and OBSERVE as your instructor discusses and demonstrates how to use the sales ticket for recording cash sales.

   (or) ____

7. CHECK YOUR KNOWLEDGE by taking Student Self-Check I, WRITING CASH SALES TICKETS.

8. READ about how to write charge sales using the sales ticket. Your instructor will provide a reference.

   (or) ____

9. READ Instruction Sheet III, USING THE SALES TICKET TO RECORD CHARGE SALES TRANSACTIONS.

   (or) ____

10. LISTEN and OBSERVE as your instructor discusses and demonstrates how to record charge sales transactions on the sales ticket.

    (or) ____

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

LEARNING ACTIVITIES, (page 2)

11. CHECK YOUR KNOWLEDGE by taking Student Self-Check II, WRITING A CHARGE SALES TICKET.

12. READ Instruction Sheet IV, WRITING A CHARGE PLATE SALES TICKET.

    (or)____

13. LISTEN and OBSERVE as your instructor discusses and demonstrates how to write charge plate sales transactions.

    (or)____

14. READ about how to record lay-away sales transactions on the sales ticket. Your instructor will provide a reference.

    (or)____

15. READ Instruction Sheet V, RECORDING LAY-AWAY SALES ON SALES TICKETS.

    (or)____

16. LISTEN and OBSERVE as your instructor discusses and demonstrates how to record lay-away sales transactions on the sales ticket.

    (or)____

17. CHECK YOUR KNOWLEDGE by taking Student Self-Check III, PROCESSING LAY-AWAY SALES.

18. READ Instruction Sheet VI, USING THE SALES TICKET TO RECORD CUSTOMERS' PAYMENTS-ON-ACCOUNT.

    (or)____

19. PRACTICE writing "Received-On-Account" transactions. Your instructor will provide transaction forms and case problems.

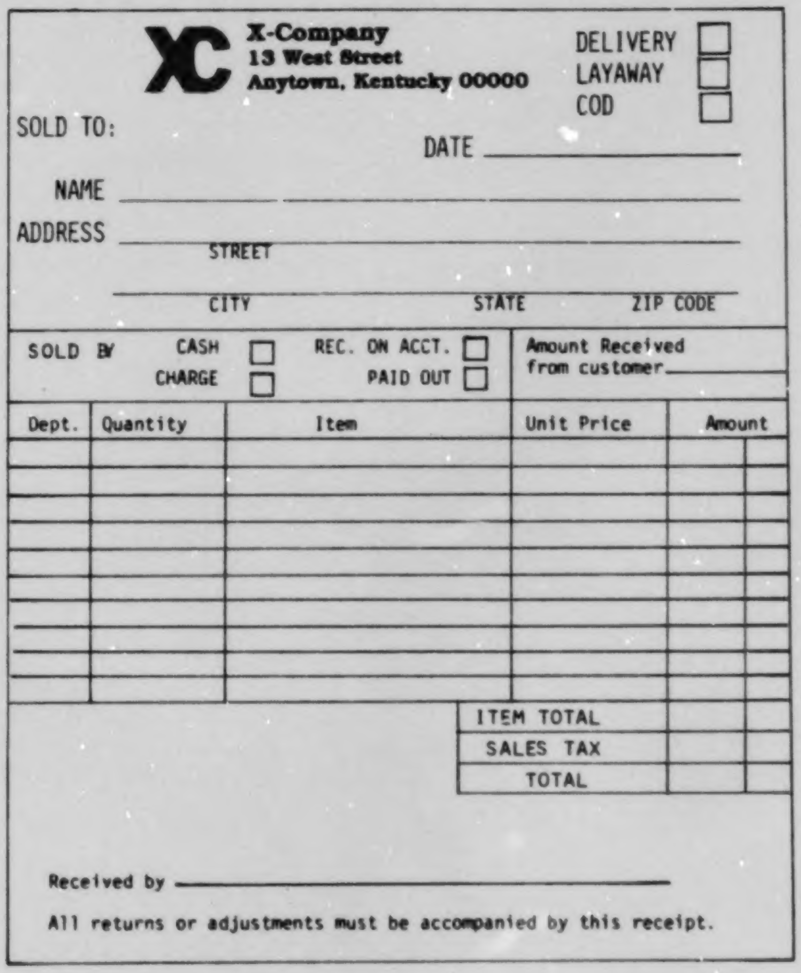
20. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

INSTRUCTION SHEET I

THE SALES TICKET

One of the most important forms that a retail salesperson has to be able to write is a sales ticket. The sales ticket is used to record many different business transactions. It is used to record:

--Cash sales.
--Charge sales.
--Lay-away sales.
--Customers' payments-on-account.
--Delivery instructions.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE ________________

NAME ________________________

ADDRESS ________________________
STREET

____
CITY STATE ZIP CODE

SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer________

Dept.	Quantity	Item	Unit Price	Amount
			ITEM TOTAL	
			SALES TAX	
			TOTAL	

Received by ________________________

All returns or adjustments must be accompanied by this receipt.

INSTRUCTION SHEET I, (page 2)

This form, when completed, serves as a proof of purchase for both the store and the customer and it also serves as a receipt when used to document customers' payments-on-account.

Each retail establishment will have their own sales ticket form that is designed for the establishment's specific needs. Although the design of the form is different from store to store, it usually is used to record the above mentioned business transactions.

Many stores have sales tickets that are designed in three parts. When the sales person records on the top sheet, there are two additional carbon copies used for delivery and store records.

When you are writing a sales ticket for documenting any business transaction, you will want to:

1. Write each entry clearly and neatly.
2. Spell each entry correctly.
3. Perform each mathematical computation accurately.
4. Complete each sales ticket according to your store's policy.

The sales ticket, however it is used, is a document for communicating to many people that a business transaction has occurred. To maintain clear lines of communication these forms must be complete, neat, and without error.

INSTRUCTION SHEET II

USING THE SALES TICKET FOR RECORDING CASH SALES

One of the most important forms that retail salespeople must be able to complete is a sales ticket. This is a record of the sale. It also serves to give other store employees information concerning the sale.

The sales ticket must be written legibly and without mathematical errors. Mistakes can cause customers to go to other stores and thus result in monetary loss for the retailer.

To emphasize the importance of this form, let us take a look at the people who will need to rely on its accuracy:

--The delivery person may have to read the sales ticket to obtain information concerning where to take merchandise.

--The shop manager or owner will have to read the sales ticket to obtain information concerning the overall operation of the business.

Thus, the sales ticket is an important link in the communication network of the retail store.

Sales tickets will vary in format but the information that must be written on them is generally the same. (See illustration.) This sales ticket has space to write the following information:

--The date the customer purchased the merchandise.

--Whether the order is to be picked up or delivered.

--The name of the person who paid for the order.
--A space for the salesperson's initials.

--A space for checking if the order is to be cash payment.

--A space for writing a description of what the customer buys and cost of the item or items.

--A space for calculating the total cost of the order.

When writing a sales ticket remember to:

--Write legibly so that other store employees and customers can read it.

--Spell all words correctly, particularly names of customers and recipients of the orders.

--Write accurate information.

--Include all information that is required according to store policy.

--Avoid mathematical errors when calculating the cost of the order.

--Ask the customers how to spell any names that you cannot spell. Avoid guessing.

STUDENT SELF-CHECK I

WRITING CASH SALES TICKETS

Directions: Now that you have read the resources concerning how to write a cash sales ticket and have seen the examples, you should be ready to practice writing them.

Ask your instructor for three blank sales tickets. Read the three orders on this page and write a sales ticket for each of them. When you have finished writing the three tickets, check them with the three completed ones which your instructor will have.

Customer #1

Mrs. John Smith, 624 Lyman Avenue, Anytown, Kentucky 00000, wants to purchase the following items at your store: 3 pillow cases at $5.25 each; 4 double bed size sheets at $10.00 each; 5 towels at $3.25 each. Mrs. Smith wishes to pay cash for the merchandise. Write a cash sales ticket for these items. Remember Kentucky has a 5% sales tax. Your department number is 28.

Customer #2

Mr. John Ritter of 419 Ruter Lane, Goldenrod, Kentucky 00000, wants to purchase the following items at your store and he wishes to pay cash. Write a cash sales ticket for these items: 1 fishing rod at $45.00; 1 fishing reel at $30.00; 10 fishing lures at $2.50 each; and 1 tackle box at $45.00. Mr. Ritter wants these items delivered to his residence which will be an additional cost of $2.50. Your department number is 14.

Customer #3

Bobby Thompson is your customer. He lives at 1113 Forest Avenue, Anytown, Kentucky 00000. Bobby wants to cash purchase the following items: 3 pairs of socks at $1.25 a pair; 2 ties at $7.50 each; 3 shirts at $15.00 each; and a suit at $125.00. Write Bobby's cash purchases on a sales ticket. Your department number is 18.

INSTRUCTION SHEET III

USING THE SALES TICKET TO RECORD CHARGE SALES TRANSACTIONS

Charge sales ticket forms will be different in format from retailer to retailer. However, each will request basically the same information. This form is one of the most important ones used by retailers as it is a record of a sales transaction.

When you are writing a charge sales ticket at the close of a sale you should be able to quickly, accurately, and legibly complete it.

Using a ball point pen, legibly write the following information:

1. Write the date of the sale.
2. Write the customer's address including:
   a. Name
   b. Street (house number or rural route number)
   c. City
   d. Zip Code
3. Record the department identification.
4. Record the number of each item purchased.
5. Write a description of the purchased items. It is suggested that each piece of merchandise be itemized on the charge sales ticket.
6. Write the unit cost of each item.
7. Extend the cost of each item. (Multiply the unit cost times the quantity purchased).
8. Add the cost of each item and enter this amount as a subtotal.
9. Calculate the applicable sales tax and enter it on the charge sales ticket.
10. Add the sales tax to the subtotal.
11. Enter the sum of the sales tax and subtotal as total.
12. Enter any additional cost such as delivery or mailing charges.
13. Add additional costs to the subtotal cost of the transaction.
14. Check each mathematical computation.
15. Ask your customer to sign the charge sales ticket.

STUDENT SELF-CHECK II

WRITING A CHARGE SALES TICKET

EXERCISE I

Directions: Using the following information, write a charge sales ticket for the transaction. On January 25, 1983, Mary Smith of 108 Lime Avenue, Anytown, Kentucky 40523, purchased the following merchandise and requested that the items be charged to her account: 1 sweater at $20.00; 1 sport jacket at $75.00; 1 pair of slacks at $30.00; and 1 shirt at $36.00. Sales tax is 5 percent. Your department number is 54. Ask your instructor for a charge sales ticket.

NOTE: Check your answers with your instructor.

STUDENT SELF-CHECK II, (page 2)

EXERCISE II

On May 17, 1983, Bob Jackson purchased the following merchandise and requested that these be charged to his account: 1 kleen face electric razor at $28.49; 1 toaster oven at $36.95; 1 bacon cooker at $19.49; 2 travel clocks at $7.49; 1 serving tray at $14.98; and 1 fry cousin at $18.49. Sales tax is 5 percent. Write a charge sales ticket for this transaction. Mr. Jackson lives at 19 River Road, Waterfront, Kentucky 40602. Your department number is 33. Ask your instructor for a charge sales form.

NOTE: Check your answers with your instructor.

INSTRUCTION SHEET IV

WRITING A CHARGE PLATE SALES TICKET

Many retailers offer their customers a charge plate sales service. The charge plate, (see the illustration on the following page), is given to the customer after his/her request for credit has been approved by the credit department. This plastic credit card serves to identify the individual as an approved credit customer. However, there are procedures that you as a salesperson must follow before writing a charge plate sales transaction:

1. Retailers periodically issue a list of lost cards to departments. You should check this list to determine that the card presented by the customer is not included on it.

2. When customers are given credit approval, they are usually given a limit on the amount that they can charge to their credit account. You must check for purchase authorization with the credit department prior to writing the charge sales ticket.

3. After you have received authorization to charge the amount of the purchase to the customer's account, write the charge plate sales ticket.

NOTE: The design of charge plate sales tickets will be different from retailer to retailer; however, they usually request the same information which is to be filled in by the salesperson and customer.

--Date of the purchase

--Salesperson's identification

a. Initials
b. Store assigned identification number

--Authorization code number

--Department identification

--Written itemized description of the merchandise or service

--Number of items purchased by the customer

--Unit price of each item

--Extended price of each item (the number purchased times the unit cost)

--Subtotal of the sale

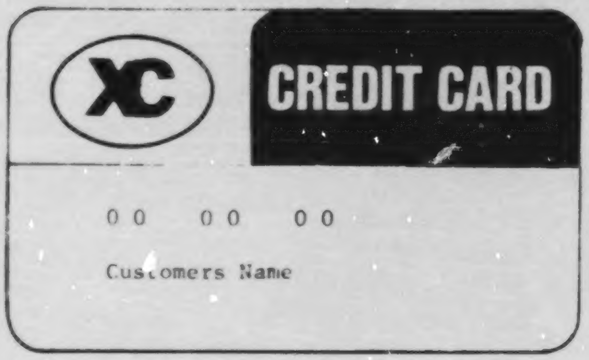
--Tax, if applicable

--Total cost of the sale (subtotal plus tax)

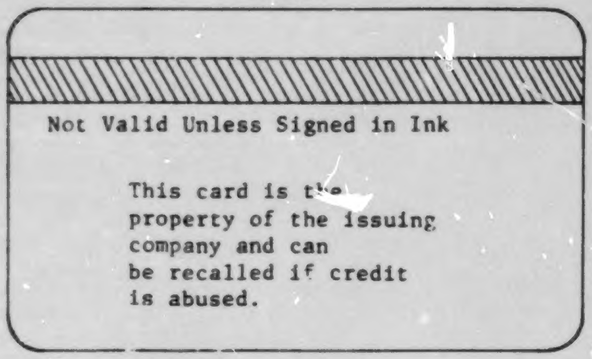
--Space for the customer's signature

4. After you have completed the charge plate sales ticket, ask the customer for his/her charge plate and imprint the name and address.
5. Ask the customer to sign the charge plate sales ticket after you have carefully checked each mathematical computation.
6. Tell the customer the total cost of the sale.
7. Return the charge plate to the customer.
8. If required by store policy, ring the sale on the cash register.
9. Present the customer with a copy of the charge sales ticket.
10. Place the store copy of the charge sales ticket in a designated area.

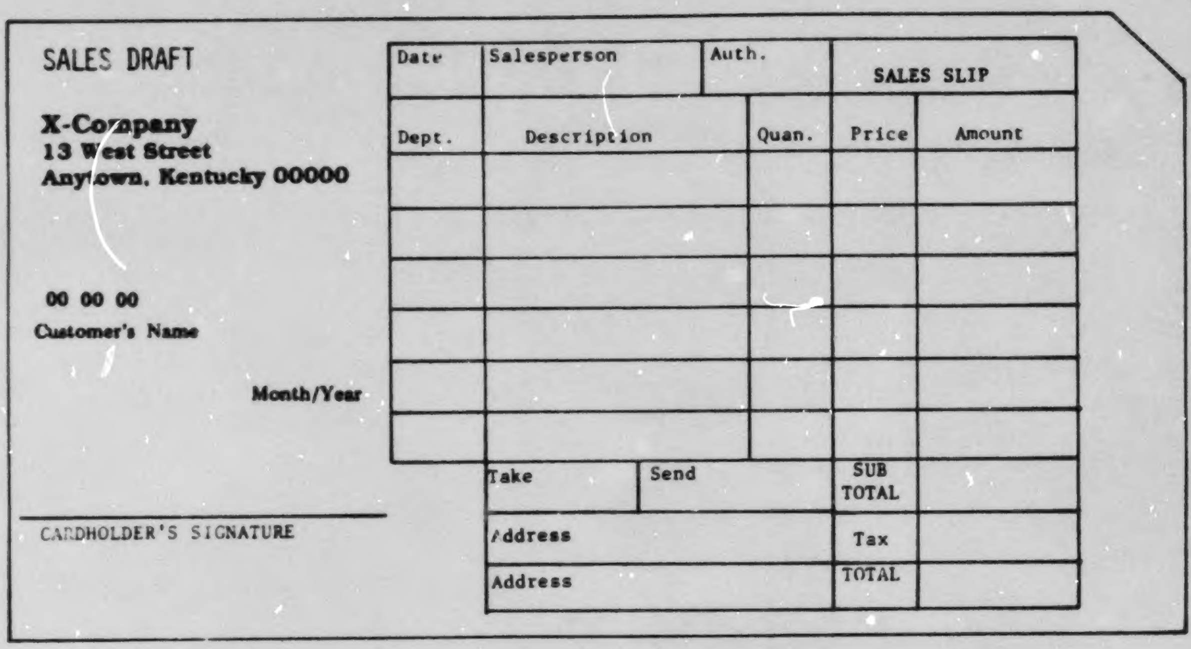
FRONT


XC
CREDIT CARD
00 00 00
Customers Name

BACK


Not Valid Unless Signed in Ink
This card is the property of the issuing company and can be recalled if credit is abused.

INSTRUCTION SHEET IV, (page 3)



SALES DRAFT

X-Company
13 West Street
Anytown, Kentucky 00000

00 00 00
Customer's Name

Month/Year

CARDHOLDER'S SIGNATURE

Date	Salesperson	Auth.	**SALES SLIP**

Dept.	Description	Quan.	Price	Amount

Take	Send	SUB TOTAL	
Address		Tax	
Address		TOTAL	

A CHARGE CARD SALES DRAFT

INSTRUCTION SHEET V

RECORDING LAY-AWAY SALES ON SALES TICKET

Retailers offer their customers many different types of charge services. One of these is called "Lay-Away Sales." The "Lay-Away" charge, as do other charge accounts, offers customers a way to buy merchandise now and pay for it later. The lay-away charge is different from other charge accounts, as the retailer will hold the merchandise until the customer has paid the total price for it. After the customer has made final and full payment, they receive the merchandise. If a customer requests an item of merchandise to be placed in lay-away and does not make total payment within the specified period of time, the item can be returned to the stock. Usually, the retailer will refund the amount of money that the customer has paid on the lay-away charge sale. As a sales person in a retail establishment that offers a lay-away charge service, you will be involved in sales situations similiar to the following situation.

A customer approaches you with one item of merchandise in hand and says, "I would like to purchase this item, but I just don't have the money to pay for it now. Is there any way that you could hold it?" In many stores, the salesperson would say. "I can put it on our lay-away charge plan for you. This charge plan will give you 90 days to pay for the merchandise. Our down payment is 10 percent of the purchase price and our service fee is $1.00. Do you want me to write this sale as a layaway? You do understand that we will hold the merchandise until you have made your last payment. Is there anything about our lay-away charge plan that you do not understand?"

"In filling out the lay-away sales ticket, the first thing I need to put on it is your name, your full address, and your telephone number. Now, the items you have picked are a sabre saw for $55.00 and a set of drill bits for $24.00. This makes your total purchase $79.00, plus sales tax of $3.95 (5%), for a total of $82.95. As you see, I have entered this information on the lay-away sales ticket. Our store policy is that the customer is to pay 10 percent of the total cost of the merchandise which, in this situation, is $8.30. You want to pay $10. As you see I have entered your $10.00 payment on the sales ticket and your remaining balance of $72.95 will be due within 90 days from today. I have also noted this on the lay-away ticket. Do you have any questions? Can you pay it off any time before the 90 days? Certainly, anytime you wish and you will receive the merchandise as soon as you have paid the remaining balance. The last thing I need is your signature. Thank you, and if I can be of any additional service to you please let me know. I will send your merchandise back to lay-away. I have attached this copy of the sales ticket to it so that the people in lay-away will know is yours."

What you have just read is exactly what could happen in a retail establishment that offers their customers a lay-away charge service. As a salesperson, you must know how and be able to complete a lay-away sales transaction.

STUDENT SELF-CHECK III

PROCESSING LAY-AWAY SALES

Directions: As a salesperson in Acme Department Store in Anytown, Kentucky, you are approached by a customer who is holding three full-sized bed sheets and three pillow cases. The customer says, "I see that the sign says that your store has a lay-away charge service. Would you please place these items on lay-away?."

The sheets are $8.95 each and the pillow cases are $5.99 each. Your sales clerk number is 53. Your department number is 8. There is a 5% sales tax. Your customer's name is Ethel Douglas and her address is 111 Allison Way, Anytown, Kentucky. She wishes to pay a $10.00 deposit. Fill out the lay-away sales charge ticket. When you finish, check your answers with the ones provided by your instructor. Ask your instructor for a lay-away sales ticket.

INSTRUCTION SHEET VI

USING THE SALES TICKET TO RECORD CUSTOMERS' PAYMENTS-ON-ACCOUNT

Retail establishments often will have their salespeople accept customers' payments-on-account. Many large stores have accounting departments where employees accept these payments. However, small retailers do expect their salespeople to be able to accept and record customers' payments. The following is a description of how this is usually done.

When a customer requests to make a payment-on-account, he/she is asking that the charge account be reduced by the amount of money being paid. When accepting the customer's payment, you should:

1. Write the transaction on either a sales ticket form that is designed to serve as a customer receipt or on the store form that is designed for recording payments-on-account.

2. When writing the received-on-account transaction include:

   --the date of the transaction.
   --the customer's name as it appears on the store charge account records.
   --the customer's address.
   --a check in the designated box if using a multi-purpose sales ticket.
   --your salesperson identification number.
   --the amount paid by the customer.
   --if cash, "cash" is written on the sales ticket.
   --if the customer pays by check, a "check" is placed in the space for item description.

3. After recording the received-on-account transaction, give the customer a copy of the receipt (usually the second copy).

4. Ring the amount received from the customer on the cash register.

5. Keep the original copy of the receipt for the store accounting department.

INSTRUCTOR'S FINAL CHECKLIST

WRITING SALES TRANSACTIONS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When writing each sales transaction, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Included all data concerning the customer..................................	[ ]	[ ]	[ ]	[ ]
b. Checked the appropriate transaction box...	[ ]	[ ]	[ ]	[ ]
c. Included appropriate data concerning description of the transaction............	[ ]	[ ]	[ ]	[ ]
d. Accurately performed each mathematical calculation..............................	[ ]	[ ]	[ ]	[ ]
e. Had customer sign appropriate tickets.....	[ ]	[ ]	[ ]	[ ]
f. Initialed the tickets....................	[ ]	[ ]	[ ]	[ ]
g. Wrote each entry legibly and accurately...	[ ]	[ ]	[ ]	[ ]
h. Spelled each entry correctly..............	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, WRITING SALES TRANSACTIONS.

Your instructor will provide you four customers and sales tickets. Write sales transactions for a cash purchase, a lay-away purchase, a charge purchase, and a received-on-account transaction.

Module R-34

R

RETAILING

PROCESSING BANK CARD SALES TRANSACTIONS

INTRODUCTION

Retail establishments offer their customers many methods for paying for merchandise. One of these methods is the Bank Card charge service. When customers elect to use this method of charge payment, they are agreeing to purchase the merchandise from the retailer with payment to be made to the card-issuing bank. As a salesperson in a retail establishment that offers bank card charge service, you will have to know how to process bank card sales. In this module, you will learn how to process bank card charge sales transactions.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a customer who desires to make a bank card sales transaction, merchandise, a bank card, a bank card sales draft, and an imprinter, process the sales transaction. All applicable information must be recorded on the bank card sales draft, the draft must be signed by the customer; and each mathematical computation must be correct.

Kentucky Department of Education
1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, THE BANK CARD SALES TRANSACTION.

   (or)____

2. READ Instruction Sheet II, WRITING A BANK CARD SALES DRAFT.

   (or)____

3. LISTEN as your instructor discusses and demonstrates how to process bank card sales transactions.

4. VIEW filmstrips 4-5 of The Cashier Series, Chase Manhattan Bank, Gregg.

   (or)____

5. CHECK YOUR KNOWLEDGE of completing a bank card sales transaction by taking Student Self-Check I, WRITING A BANK CARD SALES DRAFT.

6. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

THE BANK CARD SALES TRANSACTION

As a salesperson in a retail establishment, you will have to know how to process various kinds of sales payment plans. The retail establishment where you work may offer the customers such payment methods as: in-store charge accounts, lay-away payment service, installment charge accounts, in-store credit card plan, and bank card charge services. In this module, you will be learning how to process bank card sales transactions.

The Bank Charge Card

When a customer presents a bank charge card to you and your retail establishment that honors this service, the customer is saying that he/she desires that you "CHARGE" his/her purchase to this specific service. The customer has agreed with a specific bank that they will pay the bank for the merchandise purchased in your store. Your employer has also agreed to honor and bill the specific bank for the service rendered.

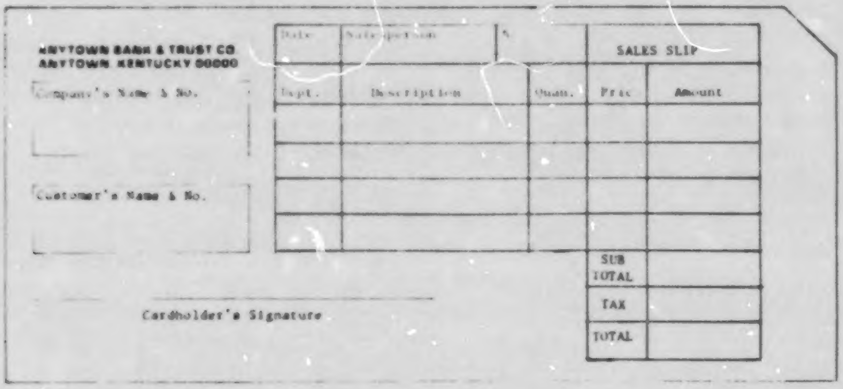
So that your store can bill the bank for the sales transaction, the people in your store who send the information to the bank must have a written record of the transaction. Therefore, you must complete a bank card charge form that will serve the customer, the store, and the bank as a record of the transaction.

When you are recording information on the bank card charge form, you should complete each using the following basic steps:

1. Write all entries clearly.
2. Use a ballpoint pen, as there are carbons that must be read.
3. List each item as a separate entry. Avoid writing such general terms as "merchandise."
4. Check to be sure entries are readable on all carbon copies.
5. Check all mathematical calculations.
6. Be certain that the customer signs the form.
7. Follow the store's procedures for verifying the customer's bank charge card and charge limit.
8. Give the customer a copy of the bank charge card sales ticket after the transaction has been completely recorded.

INSTRUCTION SHEET II

WRITING A BANK CARD SALES DRAFT



ANYTOWN BANK & TRUST CO
ANYTOWN KENTUCKY 00000

Company's Name & No.

Customer's Name & No.

Date	Salesperson	$	SALES SLIP	
Dept.	Description	Quan.	Pric	Amount
			SUB TOTAL	
			TAX	
			TOTAL	

Cardholder's Signature

The business form at the top of this page is similar to the bank card charge drafts that you will have to complete when a customer requests to use his/her bank card charging privilege to purchase merchandise. Before you begin to record the sales transaction, you must:

1. Check the card to determine that the customer's signature is on it. If the card is unsigned and the customer has valid identification ask him/her to sign it. Valid identification is usually:
   a. Driver's license with photograph.
   b. Signed credit cards.
   c. Passports with photograph.

2. Watch for counterfeit cards. Look closely at the numbers and letters on the card. If they are uneven, double exposed, or different sizes, the card could be counterfeit. Valid cards have raised numbers; counterfeit cards may have numbers that are even with the surface of the card. These numbers will not be printed by the imprinter and the purchaser will not be billed.

3. Always check the date of expiration. Most genuine cards use two digits for both the month and year for example: 01/83, not 1/83.

4. Check the signature carefully. If you have any doubts about it, ask the customer for another item of identification.

INSTRUCTION SHEET II, (page 2)

5. If you have any doubt concerning the authenticity of the bank card, call the issuing bank for an authorization. Your retail establishment will have established policies concerning when you are to call for authorization for a customer to use his/her bank card. Be certain you know and practice these policies. For example, many stores want you to call when:

   a. The amount of sale exceeds the floor limit.
   b. The signature on the card does not match the signature on the sales draft.
   c. The card holder's account number appears on the most current warning notice.

6. Usually the procedure for calling an authorization is as follows:

   a. Dial the listed number and ask the operator for "AUTHORIZATION PLEASE" and when the authorization person answers, give the following information.

      --The complete account number.
      --Month and year of expiration.
      --Total amount of purchase.
      --The stores identification number.
      --Your merchant number.
      --The acquiring bank number.

   b. If the purchase is approved, the authorization operator will give you a code number which you must record in the authorization code box on the sales draft. Should the sale be disapproved, the authorization operator will advise you how to proceed.

   c. After you have received authorization to charge the purchase to the customer's bank card, proceed to write the sales draft. Ask your department manager what to do if the authorization is not approved.

   d. Write the following information on the sales draft: (See the illustration)

      (1) Write your department number.
      (2) Write your clerk identification number.
      (3) If the merchandise is to be delivered, place a check in the "send" box. If the merchandise is to be carried by the customer, place a check in the "take" box.
      (4) Write the number of the items that the customer is buying.

(5) Write a description of the merchandise that the customer is buying. Avoid writing "items of merchandise" or "merchandise". For example write: men's shoes, size 9½, lady's blouse, claw hammer, etc.

(6) Write the unit cost of each item if more than one of the same item is being purchased. If only one item is being purchased, enter the cost in 7, or the amount column.

(7) Multiply the unit cost of each item by the quantity Write this total in the amount column.

(8) Add the entries in the amount column and write the total in the subtotal space.

(9) Using the subtotal, calculate the amount of applicable sales tax (5% in Kentucky) and enter this in the tax box.

(10) Write the total of the subtotal and the tax in the total box.

(11) Write the current date in numerical form, for example, 5/17/83.

(12) If an authorization was necessary, write the number that you were given in this box.

(13) Place the bank card in your imprinter. Place the sales draft over the card and print the customer's name, address and account number on the draft. Check to determine that all the information is stamped clearly on each copy.

(14) Ask the customer to check the mathematical calculation and to sign the sales draft.

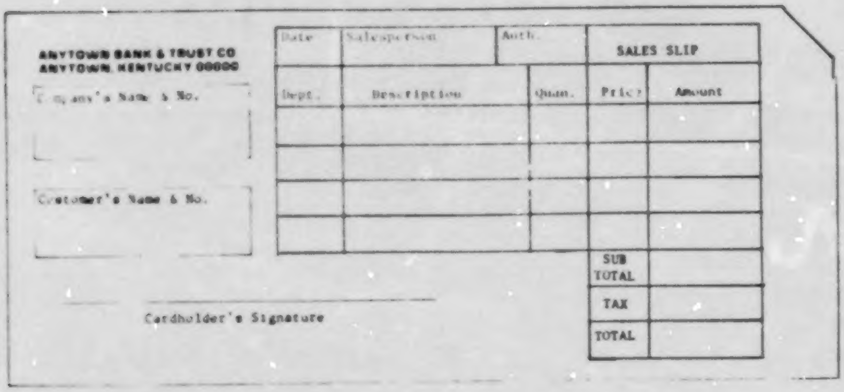
(15) Give your customer a copy of the sales draft (customer's copy).

(16) Keep the two copies in a convenient place so that they can be turned in for deposit at the close of the day.

STUDENT SELF-CHECK I

WRITING A BANK CARD SALES DRAFT

Directions: Using the following information, complete the bank card sales draft, on a seperate sheet of paper. If an authorization is needed, follow the correct procedures. Check your work according to the procedures established by your instructor.



ANYTOWN BANK & TRUST CO
ANYTOWN, KENTUCKY 00000

Company's Name & No.

Customer's Name & No.

Cardholder's Signature

Date	Salesperson	Auth.	SALES SLIP	
Dept.	Description	Quan.	Price	Amount
			SUB TOTAL	
			TAX	
			TOTAL	

Use the current date; department #1234; customer's name of John Doe; clerk #456; authorization code ABC-964, if needed; sales tax of 5%. The floor limit is $100.

Items Purchased:

Four Sweaters @ $24.99
Two skirts @ $15.50
Three blouses @ $16.95
One scarf @ $5.00
One pair of pants @ $25.00

BEST COPY AVAILABLE

INSTRUCTOR'S FINAL CHECKLIST

PROCESSING BANK CARD SALES TRANSACTIONS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When processing the bank card sales transaction, the student:	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Checked the card to determine that it was not counterfeit	[ ]	[ ]	[ ]	[ ]
b. Checked to determine that card was signed by customer	[ ]	[ ]	[ ]	[ ]
c. Wrote a bank card sales draft including:				
(1) The department number	[ ]	[ ]	[ ]	[ ]
(2) Clerk's identification number	[ ]	[ ]	[ ]	[ ]
(3) Clerk's initials	[ ]	[ ]	[ ]	[ ]
(4) Quantity of merchandise	[ ]	[ ]	[ ]	[ ]
(5) Description of merchandise	[ ]	[ ]	[ ]	[ ]
(6) Unit cost of merchandise	[ ]	[ ]	[ ]	[ ]
(7) Total cost of merchandise	[ ]	[ ]	[ ]	[ ]
(8) Date of transaction	[ ]	[ ]	[ ]	[ ]
(9) Authorization code	[ ]	[ ]	[ ]	[ ]
(10) Subtotal of merchandise	[ ]	[ ]	[ ]	[ ]
(11) Amount of tax	[ ]	[ ]	[ ]	[ ]
(12) Total amount of transaction	[ ]	[ ]	[ ]	[ ]
d. Requested the customer to sign the sales draft	[ ]	[ ]	[ ]	[ ]
f. Compared signature with the signature on the bank card	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
f. Presented the customer with a copy of the sales draft	[ ]	[ ]	[ ]	[ ]
g. Completed the transaction, avoiding making any mathematical errors	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statement below explains the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PROCESSING BANK CARD SALES TRANSACTIONS.

Your instructor will provide you with a customer (classmate) who desires to make a purchase by using a bank card. Process the bank card sales transaction.

RETAILING

PROCESSING RETURNS AND ADJUSTMENTS

INTRODUCTION

As a salesperson in a retail establishment you must know your store's policies and procedures for handling customers' returns and adjustments. At times, you may consider this task an unpleasant one, but each time you complete a return and adjustment that is satisfactory to both the customer and the store you will have maintained the customer's good will and his/her desire to return to your store in the future. In this module, you will learn how to handle customer's returns and adjustments.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provided a customer who desires to return merchandise, customer sales receipt, and a return form, process the return. When finished, all applicable information must be written on the form, and all applicable monies must be returned to the customer.

(2) Provided a customer who desires a merchandise adjustment, process the adjustment. All applicable items on the Instructor's Final Checklist should be acceptably performed.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about how to handle returns and adjustments. Your instructor will provide a reference.

   (or) ______________________________

2. READ Instruction Sheet I, PROCESSING CUSTOMERS' RETURNS.

   (or) ______________________________

3. READ Instruction Sheet II, PROCESSING CASH RETURNS.

   (or) ______________________________

4. LISTEN and OBSERVE as your instructor discusses and demonstrates how to process customers' cash refunds.

   (or) ______________________________

5. CHECK YOU KNOWLEDGE by completing Student Self-Check I, PROCESSING CUSTOMERS' RETURNS.

6. READ about how to process customers' merchandise adjustments. Your instructor will provide a reference.

   (or) ______________________________

7. READ Instruction Sheet III, HANDLING CUSTOMERS' MERCHANDISE ADJUSTMENTS.

   (or) ______________________________

8. LISTEN as your instructor discusses how to handle customers' merchandise adjustments.

   (or) ______________________________

9. CHECK YOUR KNOWLEDGE of how to process customers' merchandise exchanges by completing Student Self-Check II, HANDLING MERCHANDISE ADJUSTMENTS.

10. READ Instruction Sheet IV, COMPLETING A MERCHANDISE ADJUSTMENT FORM.

    (or) ______________________________

11. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

PROCESSING CUSTOMERS' RETURNS

Cash refunds are made only if the original purchase was a cash sale. This refund will be given to a customer when he/she has returned an unwanted item of merchandise but cannot find a satisfactory substitute. You will have to return the amount of money that the customer paid for the item of merchandise. You will need to ask the customer for the original sales ticket to be able to determine how much was originally paid. Many stores require that the customer present a cash sales ticket (receipt) before a cash refund will be made.

You will have to write a description of each cash refund that you make. Each retailer will require that you complete a form for reporting a cash refund transaction. Some will have a "cash paid-out" form. Others will use a "cash sales" ticket and others will have a "refund" form specifically designed to be used for reporting cash refunds. Whatever form is used, you must know what information is to be reported concerning the "cash refund".

When reporting a "cash refund" transaction, in most cases, you will need to record the following information on the "cash refund" form:

--The date of the "cash refund" transaction
--The customer's name and address
--Your employee identification number
--A description of the returned merchandise
--The department identification
--The number of item(s) returned
--Unit price of the merchandise
--Total amount of the item(s) returned
--Notations such as reason for return
--Subtotal of merchandise
--Sales tax
--Total amount to be refunded
--Customer's signature

Record the "cash refund" transaction on the cash register.

INSTRUCTION SHEET II

PROCESSING CASH RETURNS

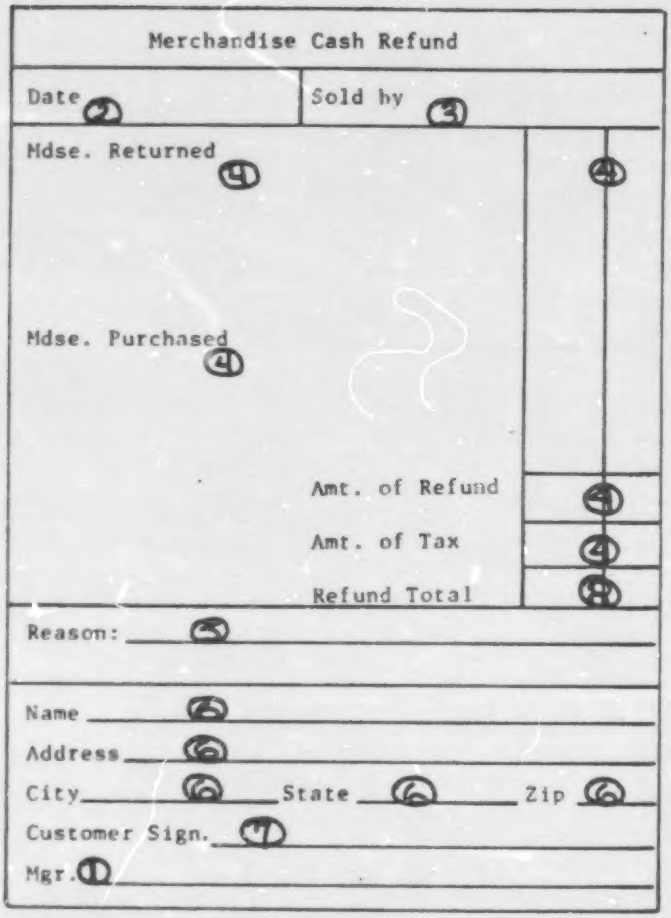
When you make the decision that the customer is to receive a cash refund you must fill out a "merchandise cash refund form". This form will account for the funds that are taken from the cash register to pay the customer's refund.

It is very important for you to remember that most retail establishments will require that their salespeople obtain the permission of their department or store manager before giving customers cash refunds.

Take a look at the following example of a typical cash refund form. Examine it carefully. Then read the information that you must include when writing a cash refund form:

1. Obtain approval to give the customer a cash refund.
2. Record the date that the cash refund is given to the customer.
3. Place your initials or signature in this space.
4. Write a description of the merchandise, its price, the amount of tax paid, and a description of any additional merchandise purchased by the customer.
5. Write a brief description of why the merchandise is being returned. Example: The on-off switch on the popcorn popper has a short, the bed sheets shrunk when washed, and the seams of the shoe soles broke in two weeks.
6. Write the customer's complete address.
7. Ask the customer to sign the form.
8. Give the customer the cash refund.
9. Place the store's copy of the cash refund in designated space of the cash register.

INSTRUCTION SHEET II, (page 2)



Merchandise Cash Refund

Date ②

Sold by ③

Mdse. Returned ④

④

Mdse. Purchased ④

Amt. of Refund ④

Amt. of Tax ④

Refund Total ⑧

Reason: ⑤

Name ⑥

Address ⑥

City ⑥ State ⑥ Zip ⑥

Customer Sign. ⑦

Mgr. ①

STUDENT SELF-CHECK I

PROCESSING CUSTOMERS' RETURNS

Directions: You have learned that there will be times when you, as a salesperson in a retail store, will have to give customers cash refunds for merchandise that they have returned to the store. You have tried to exchange the returned merchandise for other items, but your suggestions do not meet with the customer's approval. Therefore, your customer requests a cash refund.

Read the following case problem and complete the cash refund form that will serve as a record of the transaction, on a separate sheet of paper. Check your answers according to the procedures established by your instructor.

Case Problem

Ms. Alice Duvall, 1433 Ninth Street, Anytown, Kentucky 00000, has returned an Acme popcorn popper to your store and has requested a cash refund. The popper has a defective switch. She shows you her sales ticket which contains the following information:

Date of purchase - May 17, 1983
Quantity purchased - 1
Cost per item - $27.88
State sales tax paid - $ 1.39
Salesperson initials - G.F.
Total purchase price - $29.27

Your department manager, Mr. Tom Allison, has approved the Cash Refund transaction.

INSTRUCTION SHEET III

HANDLING CUSTOMERS' MERCHANDISE ADJUSTMENTS

Many retail establishments have specific people whose responsibility is to handle all merchandise exchanges and refunds. However, as a salesperson, you will also have to know how and be able to handle customer exchanges and refunds. In this module, you will be learning how to handle adjustments.

Customers' requests for merchandise adjustments can result from numerous occurrences.

--The customer has received the item of merchandise as a gift and it is the wrong size, color, or style.

--The customer bought the item of merchandise to meet a specific need and found that it will not meet that need.

--The merchandise is defective.

--The customer may have no specific reason for asking for an exchange, but does insist on having one.

These are not the only reasons you will be asked to make adjustments by customers. You will, however, have to be prepared to know what to do when you are requested to make them.

The following suggestions will help you when you are requested to make exchanges by customers.

1. Know your store's exchange policies and follow them. For example; some stores will:
    a. not make adjustments unless the customer can present a sales receipt.
    b. not make adjustments on sale items.
    c. make adjustments only on items returned within a specific period of time.
    d. make adjustments "no questions asked."
2. Listen to your customer as he/she expresses his/her request for the adjustment.
    a. Avoid being defensive when the customer is relating his/her request for the adjustment.
    b. Be attentive to the customer's request for an adjustment.

INSTRUCTION SHEET III, (page 2)

c. Avoid making remarks that will irritate the customer, such as, "you are wrong," or "you're the first one that I have heard say this." A won argument only loses customers.
d. Always take quick action concerning the customer's request for a merchandise adjustment.
e. Should the customer not accept your action concerning an exchange immediately refer him/her to your supervisior. Do not argue; do not put the customer off.

STUDENT SELF-CHECK II

HANDLING MERCHANDISE ADJUSTMENTS

Directions: The following statements concerning handling merchandise adjustments are either true or false. On a separate sheet of paper, number from 1 to 10. If the statement is true write the word true by the statement's number. If it is false, write the word false by the statement's number. Ask your instructor for the answer key.

1. A merchandise adjustment results when a customer finds that the merchandise purchased or given as a gift is unsatisfactory in some way.

2. Salespeople are never responsible for merchandise adjustments.

3. Each of the following statements describe reasons why customers return merchandise for adjustments.

   a. Does not work properly.
   b. Does not fit correctly.
   c. It is the incorrect color.
   d. Is defective.

4. You, as a salesperson in a retail establishment, can make all decisions concerning adjustments.

5. The following statements describe how you, as a salesperson, should react to a customer's request for an adjustment.

   a. Always make an effort to keep the customer in a pleasant frame of mind.
   b. Avoid arguing with customer even though you know that you are right.
   c. Listen attentively to the customer's reason for the adjustment.
   d. Make a decision concerning the customer's request for adjustment quickly, avoiding giving the customer the run-around.
   e. When you feel that you cannot satisfy the customer's request for an adjustment immediately refer him/her to your supervisior.

6. When adjusting a customer's request for an exchange, always keep the good will of the customer in mind.

7. An argument by a salesperson with a customer during an adjustment transaction may result in a lost customer.

8. As a salesperson, you are a representative of the store and the way you handle adjustments will display to the customer how other adjustments will be handled in the future.

INSTRUCTION SHEET IV

COMPLETING A MERCHANDISE ADJUSTMENT FORM

When a customer returns merchandise to a store for an adjustment, you will be expected to write a merchandise adjustment form to validate the transaction. Although each store will have a different form, the following guidelines will help you become familiar with completing one.

1. Follow the procedures of your store.
2. Write the date of the adjustment.
3. Write the name or number of the salesperson who made the original sale.
4. Write a description of the merchandise and the cost of it.
5. If the customer does exchange the merchandise for an item of the same cost, write the cost of the newly selected item.
6. Write the amount of the adjustment.
7. If the customer selects an item of lesser value, write this amount in MDSE. PURCHASE space.
8. If the customer's adjustment is more than the original purchase, write the additional amount of tax to be paid.
9. If the customer's adjustment is less than the original purchase, write the amount of tax due the customer.
10. If the adjustment is the same as the original purchase, write "EVEN EXCHANGE."
11. If the ADJUSTMENT is an "uneven" one, write the amount to be paid or to be refunded to the customer.
12. Write a description of why the ADJUSTMENT is being made.
13. Write the customer's name and address.
14. Ask your department manager to authorize the transaction.
15. Ask the customer to sign the ADJUSTMENT form.

INSTRUCTOR'S FINAL CHECKLIST

PROCESSING RETURNS AND ADJUSTMENTS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) In processing a return, the student:				
a. Had the return approved by store authority............................	[ ]	[ ]	[ ]	[ ]
b. Recorded the date paid...............	[ ]	[ ]	[ ]	[ ]
c. Initialed the form...................	[ ]	[ ]	[ ]	[ ]
d. Recorded the price, tax, and total amount to be returned................	[ ]	[ ]	[ ]	[ ]
e. Recorded the customer's address......	[ ]	[ ]	[ ]	[ ]
f. Had the customer to sign form........	[ ]	[ ]	[ ]	[ ]
g. Made refund to customer properly.....	[ ]	[ ]	[ ]	[ ]
h. Retained the copy of return form......	[ ]	[ ]	[ ]	[ ]
(2) In processing the customer's merchandise adjustment, the student:				
a. Examined the sales slip..............	[ ]	[ ]	[ ]	[ ]
b. Maintained good customer relations...	[ ]	[ ]	[ ]	[ ]
c. Obtained necessary information for filling out the adjustment form......	[ ]	[ ]	[ ]	[ ]
d. Completed the adjustment form correctly..........................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. After you go through each activity, your instructor will rate your performance listing the Instructor's Final Checklist, PROCESSING RETURNS AND ADJUSTMENTS.

(1) Your instructor will provide you a customer request for a cash refund and a refund form. Fill out the form and make the refund.

(2) Your instructor will provide you a customer who desires a merchandise adjustment. Make the adjustment.

RETAILING

GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES

INTRODUCTION

Retailers, both small and large, offer their customers gift wrapping and packaging services. These services can, when done properly, build customer good will and help bring customers back for future buying needs. In this module, you will learn how to gift wrap and package merchandise.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform these tasks, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Given merchandise and access to gift wrapping tools and materials, gift wrap the merchandise. The finished packages should compare with the instructor's model.

(2) Provided merchandise, bags, boxes, scissors, wrapping paper, packing material, tape, and a wrapping area, package the merchandise. The packaging/bagging must be secure and appropriate for the type of merchandise, and it must have the customer's copy of the sales ticket attached.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ Instruction Sheet I, GIFT WRAPPING: A CUSTOMER SERVICE.

   (or) ______________________________

2. READ Instruction Sheet II, GIFT WRAPPING BOXES, CYLINDERS, AND LARGE/ODD-SHAPED MERCHANDISE.

   (or) ______________________________

3. LISTEN and OBSERVE as your instructor discusses and demonstrates how to gift wrap merchandise.

   (or) ______________________________

4. PRACTICE wrapping boxes and cylinders in the learning laboratory. ASK your instructor for practice materials.

5. PRACTICE tying bows. (USE the bow tying machine, if one is available.)

6. PRACTICE applying ribbon to wrapped boxes and cylinders.

7. READ Instruction Sheet III, PACKAGING/BAGGING CUSTOMERS' PURCHASES.

   (or) ______________________________

8. LISTEN and OBSERVE as your instructor demonstrates how to package/bag customers' purchases.

9. PRACTICE packaging/bagging merchandise in the learning laboratory. Use Student Self-Check I, PACKAGING/BAGGING CUSTOMERS' PURCHASES as a checklist for evaluating your practice.

10. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

GIFT WRAPPING, A CUSTOMER SERVICE

Retailers, both large and small, offer their customers gift wrapping services. This service increases the sale of merchandise and helps develop good customer relations. It is offered by some retailers as a free service while others charge a minimum fee. Gift wrapping in some retail establishments is a service that is performed in one designated area; while in other stores, you will have to do it at your department counter.

As a salesperson, you will be requested by many customers to gift wrap merchandise. Your ability to gift wrap may increase your selling ability. It may also be your entry ticket to a career in retailing as some retailers hire people to help gift wrap during peak holiday seasons.

In order to perform this service, you must have:

1. An area that is clear and clean:
   a. Table
   b. Counter space
2. Assorted gift wrapping paper:
   a. Holiday paper, assorted
   b. Special occassion paper:
      (1) Birthday
      (2) Wedding
      (3) Anniversary
      (4) Tissue paper
   c. General purpose paper
3. Ribbon (assorted colors):
   a. Bow ribbon
   b. Package ribbon
4. Scissors:
   a. Ribbon shears
   b. Paper scissors
5. Bow maker (optional)

INSTRUCTION SHEET i, (page 2)

6. Tie-ons (assorted):
    a. Children
    b. Wedding
    c. Others
7. Clear cellophane tape:
    a. One-side cellophane tape
    b. Double-sided cellophane tape
8. Gift boxes (assorted sizes)
9. Wrapping cylinders (assorted sizes)
10. Assorted enclosure cards. (Cards on which the gift givers can write their name.)
11. Envelopes for enclosure cards
12. Pens for customers to write on enclosure cards

INSTRUCTION SHEET II

GIFT WRAPPING BOXES, CYLINDERS, AND LARGE/ODD SHAPED MERCHANDISE

Gift Wrapping Boxes and Cylinders

As a general rule, you will be wrapping more boxes than any other type of container. It is suggested that all merchandise be placed in a box before wrapping. After this, you should do the following:

1. Remove any price tags from the merchandise.
2. Do not remove the hang tags or any books of instruction.
3. Ask the customer if he/she wishes to sign and include an enclosure card.
4. Ask the customer if he/she wishes to select the gift wrap and ribbon.
5. If the merchandise is fragile, such as glassware, wrap each individual item in tissue paper.
6. Select a box size that will prevent the merchandise from rolling or bouncing.
7. Line the box with tissue paper; (refer to the illustration).
8. Place the merchandise into the box and cover it with the tissue paper lining.
9. Place the signed enclosure card in an envelope and place it on top of the tissue paper that enfolds the merchandise.
10. If the box has a separate lid, tape each end with one-sided clear cellophane tape.
11. Wrap the box by: Cutting or tearing from the gift wrap paper roll a piece of gift wrap approximately two times the length of the largest dimension of the box and long enough so that the ends will extend more than half the depth of the box.
12. Place the gift wrap flat on the top of the wrapping table.
13. Center the box on the wrapping paper top side down.
14. Lift the paper over the box.
15. With paper scissors, trim the overlap so that it can be turned under approximately ½-inch.
16. Turn the overlap under ½-inch to create a smooth straight fold.

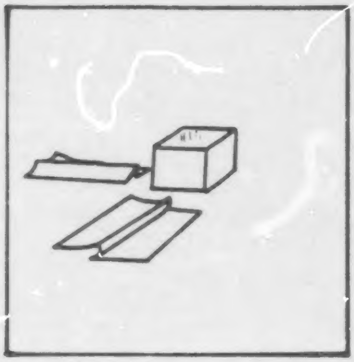
INSTRUCTION SHEET II, (page 2)

17. Using the two-sided clear cellophane tape, place one or two pieces on the under side of the overlap and press it to the other fold.
18. Fold each end in so that the top flap will fold down and the bottom flap will fold up.
19. Place one or two small pieces of two-sided clear cellophane tape on the bottom flap and press it to the top flap.
20. Apply the ribbon. (See the illustrations on the following pages.)
21. Apply the bow to the package. (See the illustrations on following pages.)

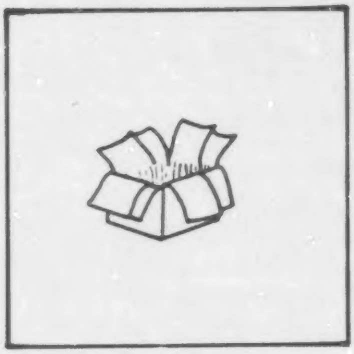
PREPARING THE BOX PRIOR TO GIFT WRAPPING

1. Line the box by pleating two or three thicknesses of tissue as wide as the box's width.

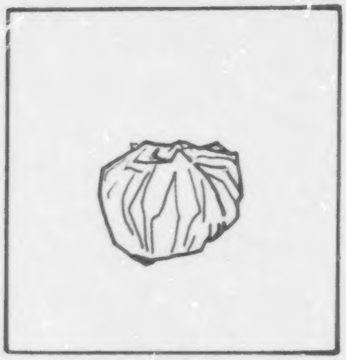
   Do the same for the length.



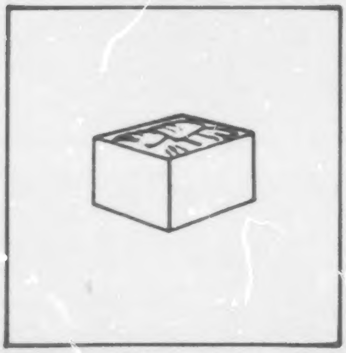
2. Cradle gift in gathered tissue.



3. Fold the tissue lining over the cradeled gift. Enclosure card can be placed on top before closing.



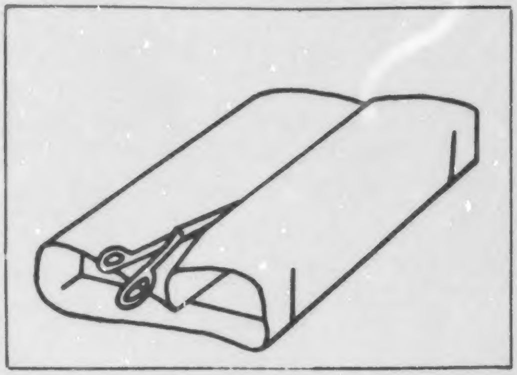
4. Cross inner wrapping - lining tissue. Color should compliment wrapping paper.



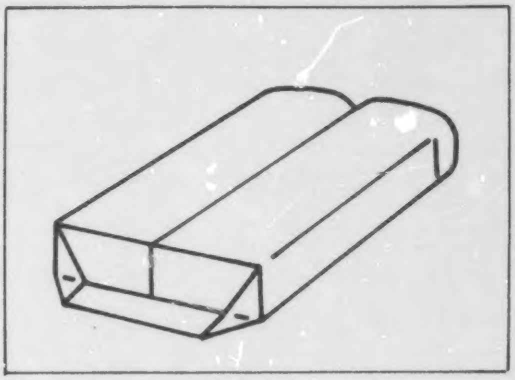
WRAPPING THE PACKAGE

SQUARE BOXES - RECTANGULAR BOXES

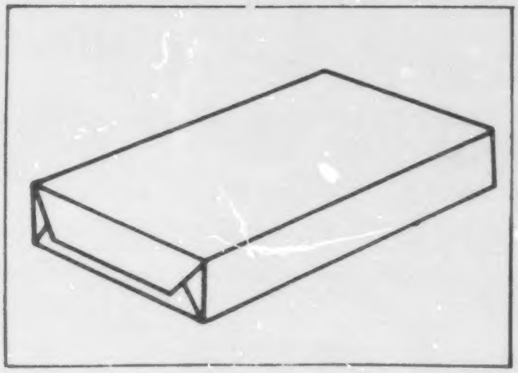
1. Center the wrapping paper beneath the box. Lift the paper and trim the over-lap so that it can be turned slightly. Turn under and fasten with concealed or two-sided tape.



2. Paper should extend over both ends of the box a little more than half the depth of the box. Close the ends by folding the sides in, the top flap down, the bottom flap up.

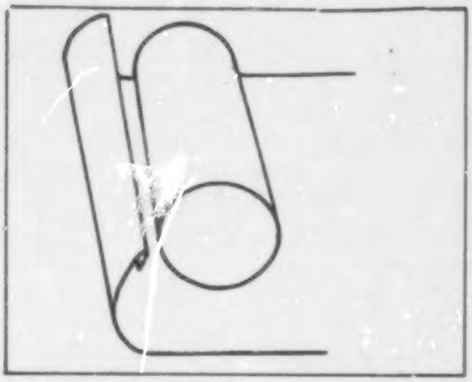


3. Fasten with concealed or two-sided tape.

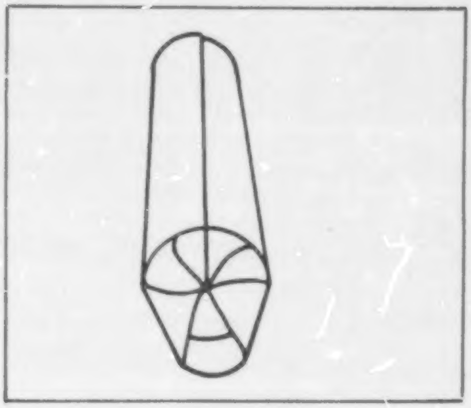


WRAPPING THE CYLINDER

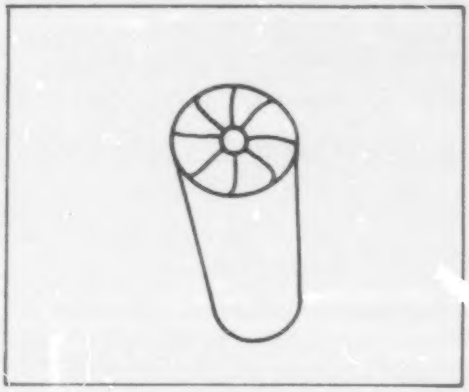
1. Cut the length of the gift wrap to slightly overlap the circumference of the cylinder. Make a ½-inch fold in the overlap and secure with two-sided tape.



2. Fold down one small section of the end flap and continue in pin wheel fashion taking care to crease each section. Repeat for other end.

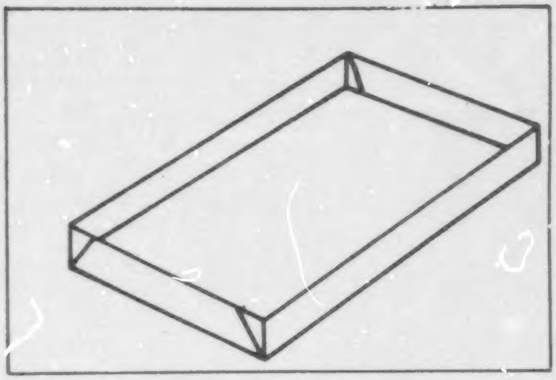


3. Attach small adhesive seal to each end of the cylinder.

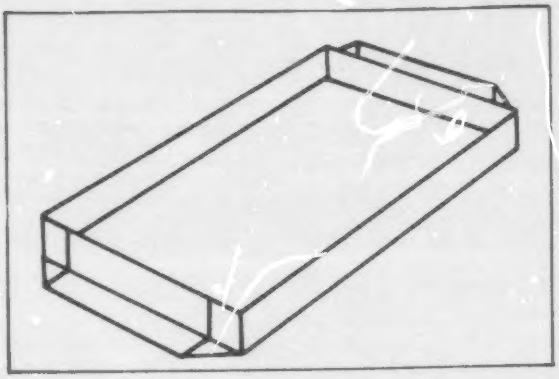


SEPARATE LID

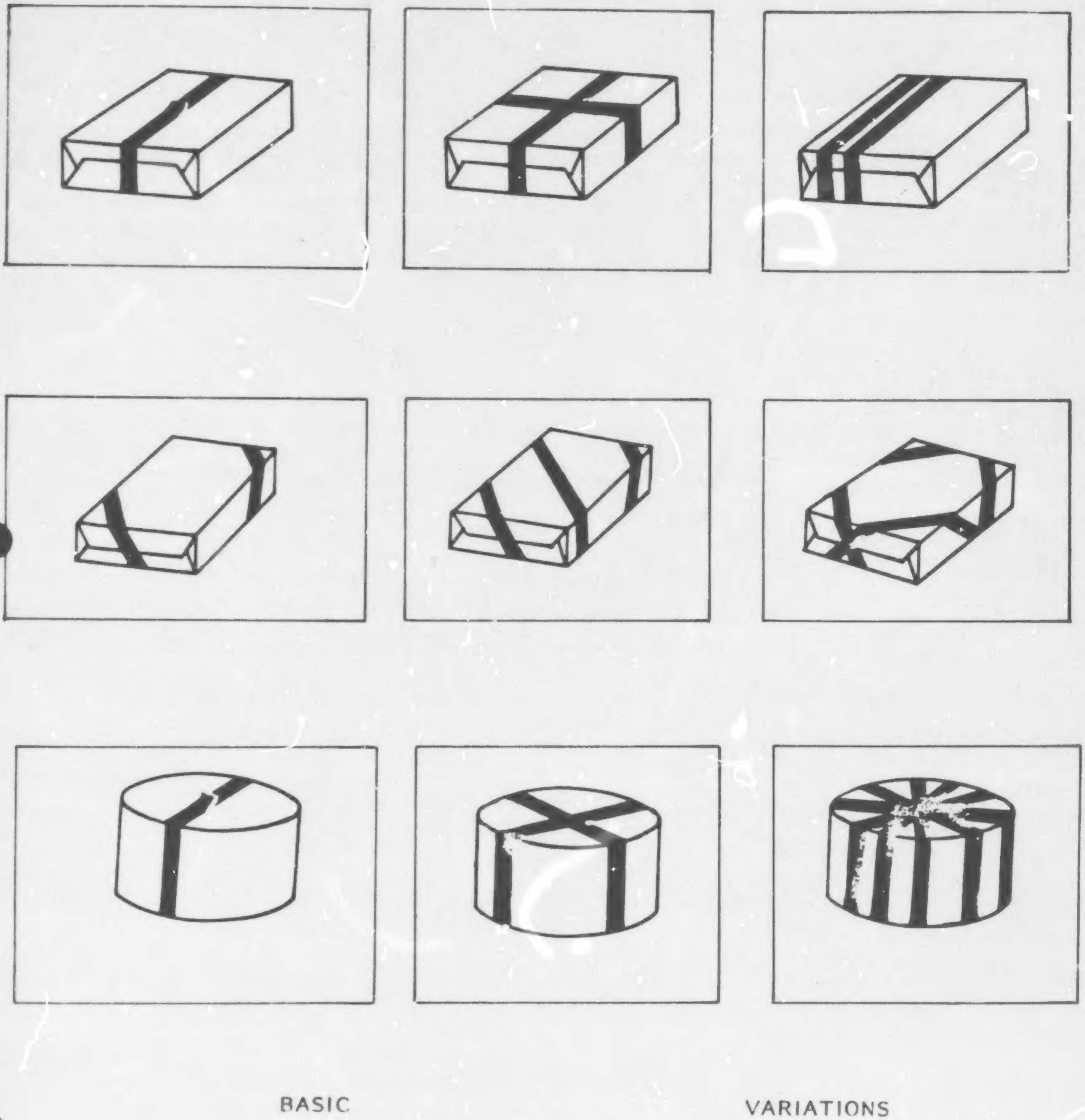
1. Cut paper to a size that will fold over the sides and inside the lid. Snip the paper at the four corners even with the edge of the box.



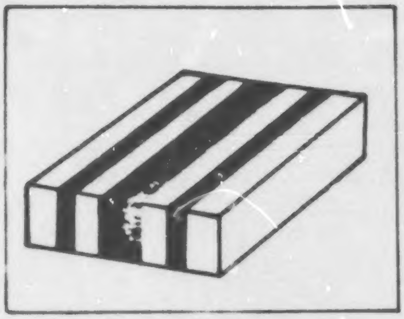
2. Fold the end flaps up. Tape them inside. Wrap bottom of box in the same way.

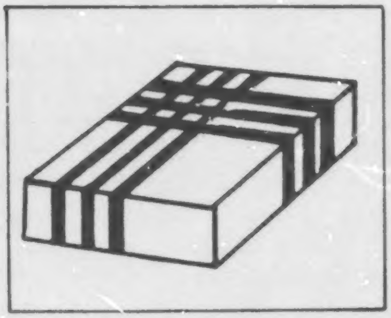


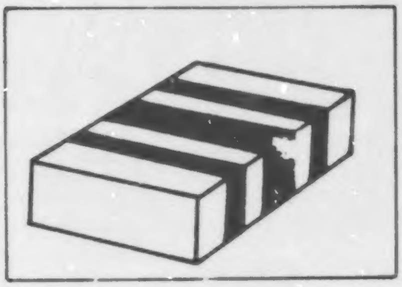
APPLICATION OF RIBBON TO WRAPPED PRACKAGE

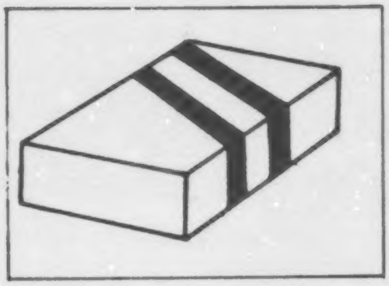

BASIC
VARIATIONS

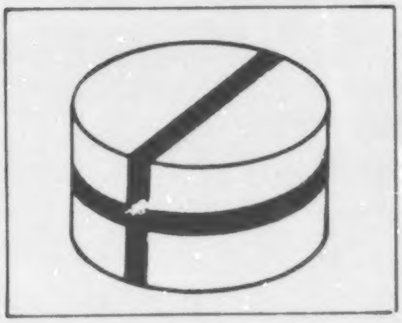
OTHER VARIATION OF RIBBON APPLICATIONS

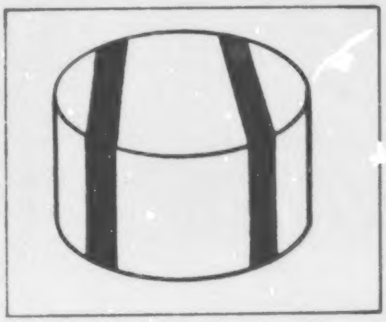




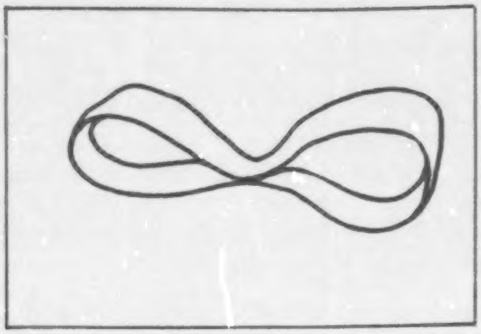




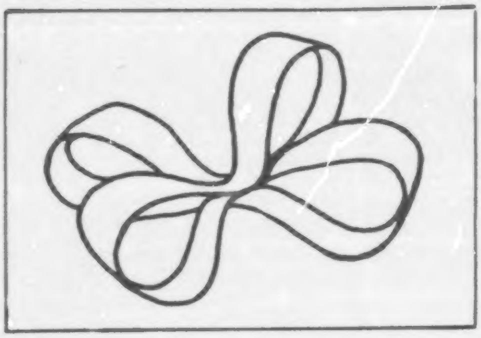




MAKING A KNOTLESS BOW

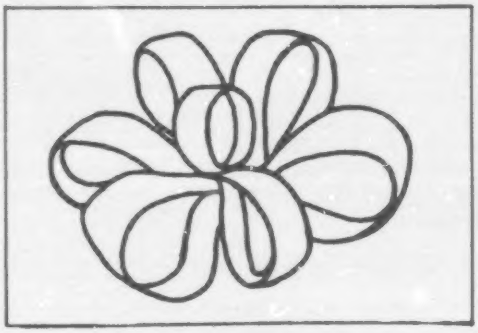


1. Use self-adhesive ribbon. To make an "s" bow, cut 12 strips of ribbon, 11 inches long. Moisten both ends of one piece and press to the center.



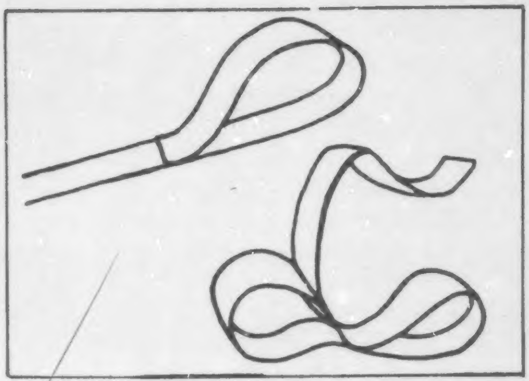
2. Repeat this step with another piece of the 11 inch ribbon. Moisten one bow and attach it to a second bow as illustrated. Put this pair aside. Repeat this step until six pairs are made.

3. Moisten the pairs, one by one, and attach them diagonally. Press a small loop to the center.

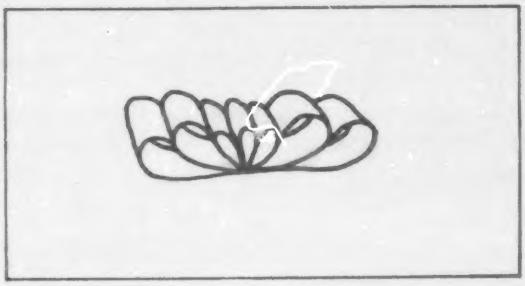


TAILORED BOW

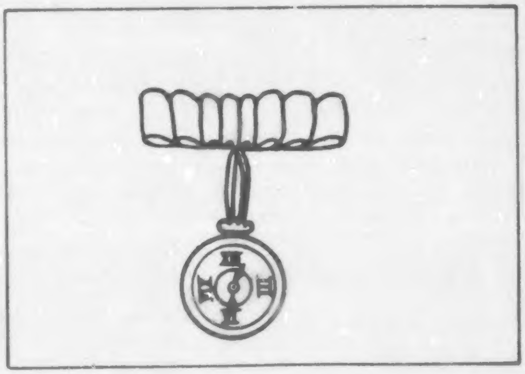
1. The tailored bow is excellent for packages that are to be mailed. Use self-adhesive ribbon. To make a 6 inch bow, cut a piece of ribbon 2½ feet long.
   Moisten one end of ribbon and form a loop, 3 inches long.



2. Moisten the center and make a matching loop on the other side.
   Continue this procedure, making slightly smaller pairs of loops each time. End with a small loop in the center.



A variation of the tailored made bow.



INSTRUCTION SHEET III

PACKAGING/BAGGING CUSTOMER'S PURCHASES

You have helped a customer satisfy a need by selling them an item of merchandise. You have written the sales ticket, and you have thanked the customer for selecting your store in which to make the purchase. Have you completed your responsibilities to your customer? No! You must now select an appropriate way to package or bag your customer's purchase. Packaging and bagging will include selecting and packaging the customer's purchase in an appropriate carry-out bag or box. When you are packaging or bagging your customer's purchases you should do the following:

1. Carefully inspect the merchandise to determine that it is in good condition.
   - a. The merchandise should not have any visible damage.
   - b. It should not be soiled or dusty.
   - c. It should have all hang tags attached.
   - d. It should have all appropriate warranties, instruction books, and care instructions attached or enclosed.
2. Select the most appropriate method for containerizing the merchandise for carry-out:
   - a. Bagging
   - b. Boxing
   - c. Box and bagging
   - d. Boxing, wrapping, and bagging
3. Assemble the appropriate materials and tools for placing the merchandise in a container:
   - a. Bags
   - b. Boxes
   - c. Wrapping paper
   - d. Tape
   - e. Packing material
   - f. String
   - g. Scissors
   - h. Paper for wrapping breakable items before boxing or bagging
4. Before placing breakable merchandise into a container, wrap each in a shield of paper to protect them from bumping against each other. Fill empty spaces in the box with packing material to prevent any damage to the merchandise.
5. Of the breakable items of merchandise are not prepackaged:

a. Wrap each item in paper tissue or newspaper.
b. Select a size box that will be large enough to hold the merchandise but will prevent the items from bumping each other.
c. Place individually wrapped items into the box.
d. Place tissue paper, newspaper, or packing material in the empty spaces between the items of merchandise.
e. Fill the box with packing material; i.e., newspaper, tissue paper, packing material.
f. Close and tape the box.
g. Place the box into an appropriate size and weight bag.
h. Hand the customer the sales ticket, attach it to the outside of the bag, or place it inside of the carry-out bag.

6. Bag pre-packaged merchandise.

a. Numerous items of merchandise are pre-packaged by the manufacturer and will not have to be packed and boxed.
b. Select an appropriate size and weight bag and place the pre-packaged item(s) into the bag.
c. Fold the top edge of the bag down approximately one inch.
d. Either attach the customer's copy of the sales ticket to the outside of the bag, place it in the bag, or hand it to the customer.
e. Hand the bagged merchandise to your customer.

7. Bag regular merchandise:

a. Select an appropriate size and weight bag.
b. If the customer has purchased multiple items, place the nonbreakable, noncrushable ones on the bottom and sides of the bag.
c. Place crushable and breakable items on the top layer of the bag.
d. Either hand the sales ticket to the customer, attach it to the bag, or place it into the bag.
e. Hand the bag to the customer.

7. Box soft goods such as clothing and towels:

a. Select a box large enough to hold the merchandise so that it will not be wrinkled.
b. Fold the merchandise to fit into the box.
c. Close and tape the box.
d. If appropriate, place the box into a bag.
e. Either hand the customer a copy of the sales ticket, attach it to the bag or box, or place it into the box or bag.

INSTRUCTION SHEET III, (page 3)

9. Bag suits and dresses.

Many retailers use garment bags for men's suits and women's dresses. The garment bag is a protective cover that is slipped over or zipped around the article of clothing to protect it from soil and wrinkles.

To bag a suit or dress using a zipper garment bag:

1. Hang the garment on a hanger rod.
2. Unzip the bag.
3. Enclose the garment in the bag.
4. Carefully zip the bag, checking to assure that no part of the garment will be caught in the zipper.
5. Attach a copy of the sales ticket to the garment bag or hand a copy to the customer.
6. Hand the garment to the customer.

STUDENT SELF-CHECK I

PACKAGING/BAGGING CUSTOMERS' PURCHASES

Directions: You have read Instruction Sheet III; you have observed your instructor demonstrate how to package/bag customers' purchases; and you have practiced packaging/bagging customers' purchases. Now you are ready to check your ability to package/bag customers' purchases.

Your instructor will provide you with a variety of merchandise and materials for packaging and bagging customers' purchases. Select the best method and package/bag each of the items of merchandise. Use the following checklist to determine how successfully you have performed this activity.

1. I inspected each item of merchandise to determine that it was in good condition before wrapping it.

2. I selected the best method for packaging/bagging the merchandise.

3. I assembled the necessary materials for packaging/bagging the merchandise.

4. I used packing materials for breakable merchandise.

5. I wrapped breakable items to prevent breakage.

6. I placed items in appropriate strength and size bags.

After you have checked your packages, ask you instructor to check them.

INSTRUCTOR'S FINAL CHECKLIST

GIFTING WRAPPING AND PACKAGING CUSTOMERS' PURCHASES

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

(1) The student's finished gift wrapped package compared with the instructor's model and the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Selected appropriate gift wrapping tools and materials..................	[ ]	[ ]	[ ]	[ ]
b. Wrapped glass items appropriately....	[ ]	[ ]	[ ]	[ ]
c. Selected a box and/or cylinder enclosure (box) of appropriate size for the item........................	[ ]	[ ]	[ ]	[ ]
d. Taped each enclosure securely, concealing each piece of tape under each fold and flap......................	[ ]	[ ]	[ ]	[ ]
e. Tied bows that complimented the gift wrap................................	[ ]	[ ]	[ ]	[ ]
f. Attached each bow and fastened in a secure manner.......................	[ ]	[ ]	[ ]	[ ]
g. Gift wrapped each item in a manner that was artistically pleasing.......	[ ]	[ ]	[ ]	[ ]

(2) The bagged/packaged merchandise was:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Packaged/bagged in appropriate size enclosures..........................	[ ]	[ ]	[ ]	[ ]
b. Was securely packaged/bagged.........	[ ]	[ ]	[ ]	[ ]
c. Had the sales ticket attached........	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must able to complete in order to finish this module. After you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, GIFT WRAPPING AND PACKAGING CUSTOMERS' PURCHASES.

(1) Your instructor will provide gift wrapping tools, materials, and items to be gift wrapped. Wrap each item.

(2) Your instructor will provide you with a variety of items to package/bag. Package/bag each of the items of merchandise.

RETAILING

OPENING THE SALE

INTRODUCTION

Have you ever walked into a retail establishment to buy merchandise and had to search for a salesperson to help you? How did you feel about the store when this happened? Did you feel that you were selling yourself the merchandise? Or did you feel, as many would, like walking out and going to another store? Customers' first impressions and sometimes lasting ones are formed by the approaches or lack of approaches made by the salespeople. It is up to you and your associate salespeople to help your customers form a positive attitude about your store. To do this you must learn and practice the procedures of making positive, friendly, and sincere approaches to the most important people who enter your store, "your customers." In this module, you will learn the first step toward selling merchandise. You will learn how to make positive, friendly, and sincere approaches to your customers.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity.

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided customers and merchandise, make a sales approach to each of the customers. Each of the approaches must meet the applicable criteria on the Instructor's Final Checklist.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about how to make customer approaches. Your instructor will provide a reference.

   (or) ______________________________

2. LISTEN and OBSERVE as your instructor discusses and demonstrates how to make customer approaches.

   (or) ______________________________

3. REVIEW your understanding of opening the sales by reading Instruction Sheet I, THE SALES APPROACH.

   (or) ______________________________

4. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, WAYS OF APPROACHING CUSTOMERS.

5. READ about how to determine customer needs. Your instructor will provide a reference.

   (or) ______________________________

6. REVIEW your understanding of determining customer needs by reading Instruction Sheet II, DETERMINING CUSTOMER NEEDS.

   (or) ______________________________

7. CHECK YOUR KNOWLEDGE by completing Student Self-Check II, DETERMINING CUSTOMER NEEDS.

8. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

THE SALES APPROACH

Remember, you never get a second chance to make a first impression. You must put the customer at ease, erase any barriers or hostility, and make the customer feel you are a person they can trust.

TYPES OF APPROACH:

Greeting approach	"Good morning Mrs. Jones, how are you today?"
Introductory	"Hello, I"m John Doe, could I be of service to you?"
Product approach	Place a product in the customer's hand and make a positive statement about the product.
Combination Greeting and Service	"Good afternoon, my name is Mike, may I help you?"

Never use the question "May I help you?" without first using some type of greeting or introduction.

STUDENT SELF-CHECK I

WAYS OF APPROACHING CUSTOMERS

Directions: As you have learned, there are a number of ways to approach customers. Write, using a separate sheet of paper, an effective approach for each of the following:

I. Greeting Approach

II. Introductory Approach

III. Product Approach

IV. Combination Greeting and Service

Using a student as a customer, practice the approaches you have written. Have your instructor observe your role playing.

INSTRUCTION SHEET II

DETERMINING CUSTOMER NEEDS

Before showing your customer any merchandise, you must adequately determine his/her need. It is important to the sales process that you show the customer the merchandise he/she is interested in and not waste his/her time. This can be done if you ask three or four questions that will help you determine what merchandise to show the customer. Some sample questions are shown below:

1. Is there something specific that interests you?
2. What size do you need?
3. Is this for you or someone else?
4. What color or shade would you like?
5. Is there a brand you have in mind?
6. Would you like a cassette or an 8-track?

Each question should lead to the next until you have an idea of what merchandise he/she needs. Once you have made this determination show them the merchandise they are interested in.

STUDENT SELF-CHECK II

DETERMING CUSTOMER NEEDS

Directions: Listed below are two examples of customers coming into stores looking for specific types of merchandise. Write, on a separate sheet of paper, at least three questions you would ask in each case to help determine the customer's needs.

Example I:

A woman comes into your sporting goods store looking for a pair of jogging shoes.

Example II:

A man comes into your record and tape store looking for a tape.

After writing the three questions to be asked in each case, pick another student and practice determining the customers needs by asking the student the questions, (using a role playing situation). When you are ready, have your teacher evaluate your ability to determine customer's needs.

INSTRUCTOR'S FINAL CHECKLIST

OPENING THE SALE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
1. The student demonstrated the following characteristics during the oral sales approaches:				
a. Friendliness	[ ]	[ ]	[ ]	[ ]
b. Sincerity	[ ]	[ ]	[ ]	[ ]
c. Helpfulness	[ ]	[ ]	[ ]	[ ]
d. Postiveness	[ ]	[ ]	[ ]	[ ]
2. Each sales approach gained the customer's attention	[ ]	[ ]	[ ]	[ ]
3. Each sale approach demonstrated the student's ability to:				
a. Put the customer at ease	[ ]	[ ]	[ ]	[ ]
b. Focus attention on the needs of the customer	[ ]	[ ]	[ ]	[ ]
c. Gain the confidence of the customer	[ ]	[ ]	[ ]	[ ]
d. Determine the type of customer to be served	[ ]	[ ]	[ ]	[ ]
e. Establish a positive opening for the sales presentation	[ ]	[ ]	[ ]	[ ]
f. Focus the customer's attention to the merchandise or service being sold	[ ]	[ ]	[ ]	[ ]
4. Each sales approach demonstrated the student's readiness to learn the next step of selling, "THE SALES PRESENTATION"	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, OPENING THE SALE.

Your instructor will provide you with three customers. Make a sales approach to each of the customers.

RETAILING

PRESENTING PRODUCT INFORMATION

INTRODUCTION

Salespeople without knowledge of the products in the retail establishment where they work are like singers without knowledge of the words to songs they perform. If you are to enjoy selling merchandise, if you desire to have confidence in your selling skills, and if you are going to serve the needs of your customers, you must have knowledge of the products that you sell and the ability to relate this information to your customers. In this module, you will learn the kinds of product information that you must have and how you can use it to serve your customers.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided merchandise and a customer who is seeking merchandise information, present the information to the customer. All applicable items on the Instructor's Final Checklist should be acceptably performed.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about presenting product information. Your instructor will provide a reference.

   (or)____________________________

2. READ Instruction Sheet I, THE IMPORTANCE OF PRODUCT KNOWLEDGE.

   (or)____________________________

3. READ Instruction Sheet II, CUSTOMERS WANT TO KNOW AND YOU WANT TO LEARN.

   (or)____________________________

4. READ Instruction Sheet III, HOW TO GET PRODUCT INFORMATION.

   (or)____________________________

5. LISTEN as your instructor discusses how to gather product information.

   (or)____________________________

6. READ Instruction Sheet IV, PRESENTING PRODUCT INFORMATION TO CUSTOMERS.

   (or)____________________________

7. CHECK YOUR KNOWLEDGE of acquiring product information by completing Student Self-Check I, PRODUCT INFORMATION FACT SHEET.

8. PLAY THE ROLE of a salesperson in presenting product information to a customer. (Ask a fellow student to play the role of a customer. Using your product information fact sheet, present the product information to your fellow student. Ask your instructor to evaluate your presentation.)

9. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

THE IMPORTANCE OF PRODUCT KNOWLEDGE

If you desire to be a professional salesperson and not an "order taker", if you desire to have confidence in your ability to serve customers by helping them purchase merchandise that will meet their specific needs, and if you wish to enjoy your work as a salesperson, you must acquire knowledge of the products you sell and the ability to relate this information to your customers. You must always keep in mind that all products and services are designed and produced to meet specific needs of customers. You must know what these needs are and you must know how the products or services that you sell can help your customers satisfy these needs. If you wish to be a professional--an expert salesperson--then you must constantly search for information about the products and services that you sell and you must constantly be designing ways that you can present this information to your customers. Be an expert, a professional, a salesperson, don't be an "order taker".

INSTRUCTION SHEET II

CUSTOMERS WANT TO KNOW AND YOU WANT TO LEARN

You must learn everything there is to know about the products and services that you sell because the people that you serve, "your customers", may ask. You must know and be able to tell your customers answers to the following variety of questions.

1. Do you have my size in this shoe? SIZE(s)
2. How much does this wood burning stove weigh? WEIGHT
3. I am allergic to wool. Is there any in this suit? MATERIAL AND COMPOSITION
4. Is the car body unibody or are the fenders welded? CONSTRUCTION
5. Has this house been painted with latex or an oil-based paint? FINISH
6. Can you describe the scent of this perfume for me? ODOR OR TASTE
7. I want to mail this shirt to my brother in California. Can you box it for me? PACKAGING
8. How much will this stereo cost if I buy it with two matched speakers? PRICE
9. I am looking for a London Fog raincoat. Do you carry them? BRAND NAME
10. My son asked me to buy him a pair of jogging shoes. Can you tell me which ones are the most popular with teen-aged joggers? POPULARITY
11. I have heard so much about these new kerosene heaters. Can you tell me something about the development of this one? BACKGROUND OR HISTORY
12. I want to start a set of sterling silver dinnerware, but I don't want to start a pattern that will be discontinued in the near future. Which of these patterns will be continuous stock? AVAILABILITY
13. Do you have the new video game that we saw in the television commercial? ADVERTISING
14. What is the length of the warranty on this toaster oven? WARRANTY
15. Will your store be able to fix this television set if I should have any problems with it? SERVICE AND REPAIR

INSTRUCTION SHEET II, (page 2)

16. Will there be any additional cost for putting this built-in oven in my kitchen? INSTALLATION COSTS

17. Would you demonstrate for me how to run this vacuum cleaner? OPERATION INSTRUCTIONS

18. I like this neck scarf. Please show me how to wear it? HOW TO WEAR

19. Please explain to me how to mix this cement for pouring. HOW TO PREPARE

20. Can you show me how to put this bicycle together? HOW TO ASSEMBLE

21. Please tell me how to paint with this epoxy paint. HOW TO APPLY

22. Could you show me how to make a grouping with these framed prints? HOW TO ARRANGE

23. I am not familiar with displaying wall hangings. Would you please give me some ideas? HOW TO PLACE

24. Will you show me how to reset this digital watch? HOW TO ADJUST

25. My wife requests that I buy washable slacks. Can you tell me if these are washable? HOW TO CLEAN

26. Do I need to do anything to this lawn mower to prepare it for storage at the end of the season? HOW TO STORE

27. I have a fibre glass boat and I have recently put a hole in it. Can you tell me how to fix it? HOW TO REPAIR.

28. What do I need to do to keep this gas furnace in good operating condition? HOW TO MAINTAIN

29. I have been told that some trees have an unpleasant odor. Will this gingko have such an odor? PLEASANT OR UNPLEASANT ODORS

30. This zippered, snap-on snuggy will make those long, cold winter nights much more bearable, don't you think? PERSONAL COMFORT

31. At what temperature will I be able to maintain my home if I buy this air conditioner? PLEASURE

32. How will owning this microwave oven help me personally? PERSONAL BENEFITS

INSTRUCTION SHEET II, (page 3)

The questions that you have just read are not by any means the only ones that customers will ask you to answer. These only represent the variety of questions that you will be expected to answer. You, as a professional salesperson, must be able to answer your customers' questions concerning the products sold in your store. Always remember, if you can't be of service to your customers, there are other stores in town who will welcome the opportunity to serve them.

In summary, the importance of having and being able to give the customers product information is so you will be able to serve the needs of the most important people in the world, "your customers." The kinds of questions that you will be asked will usually relate to one of these general catagories.

--Product composition

--Product appearance

--How the product is made

--How to use the product

--Price of the product

--Terms of the warranty

--Product performance

--Product repair service

--Care of the merchandise

--Price of the product

--Brand name

--Other or related items needed

--Competing products

Yes, to be a professional salesperson you must have a lot of product information.

INSTRUCTION SHEET III

HOW TO GET PRODUCT INFORMATION

Product information is a necessity for you to have if you are to serve your customers as a professional salesperson. Information is available from the following sources:

The Product(s)

By studying the merchandise, you can learn the following information:

--Appearance
--Uses
--Style
--Color
--Brand
--Price

--Unique features
--Safety features
--Sizes
--How it is used
--How to care for it

Your Customer(s)

Your customers can give you valuable sales information, such as:

--How the product performs
--How the product wears
--What they like best about the product
--How it compares to competition

Your Personal Experience

By personally using the products you sell, you will be able to tell your customers:

--How the product performs
--How to use the product
--How to assemble the product
--How to care for the product
--Safety features of the product
--How to repair the product

Your Professional Associates

Your professional associates can be one of the most valuable sources of product information that is available to you. When you are learning about products of which you do not have knowledge, your associates can be very helpful and knowledgeable.

You can find much valuable information about the products you sell in printed media, such as books, magazines, consumer guides and sales bulletins. Printed media can be used to answer the following:

--How to assemble the product
--How to care for the product
--How the product is manufactured
--How the product compares to other similiar products
--How the product rates with consumers
--How the product is selling locally, regionally, and nationally
--The ingredients of the product

Sales meetings, manufacturer's representatives, and personal visits to the manufacturer's plant will be valuable sources of product information. By using these sources, you can obtain such valuable information as:

--How the products are assembled
--How the products are selling
--Quality checks used when building the product
--New uses for old products
--New products being introduced
--Improvements made on old products
--How the products are designed and made
--The amount of research used in developing new products

In summary, be alert to obtain and use new sources of product information often. Acquire accurate knowledge and communicate it your customers. Use this product information to help your customers satisfy their needs for specific products or services.

INSTRUCTION SHEET IV

PRESENTING PRODUCT INFORMATION TO CUSTOMERS

After you have studied your products, you will want to be able to tell your customers about them. As a professional salesperson, you have one major objective to reach and this is to assist your customer to satisfy a need or desire for a product or a service.

Before you begin your presentation of product information, stop for a moment and ask yourself "HOW CAN I DETERMINE THE CUSTOMER'S NEEDS?" By asking questions you will determine the specific product or products that your customer needs.

Show examples of the product and ask, "As you see, Mrs. Smith, we do have a wide selection of refrigerators from which you can choose. What color were you considering?" Always be prepared to ask some well-chosen questions which will help you assist your customer in making selections that will fulfill their needs. The following basic question format can help you:

Who When
What How
Where Why

You must be willing to listen to your customers if you expect to be able to help meet their specific needs. After questioning your customer, listen with 100% of your attention focused on your customer's answer. You can be a good listener by doing the following:

1. Learning product information or answers to the questions that your customer will ask.

2. Stopping your conversation to listen to your customer express his/her specific needs. Let your sales presentation be a two-way conversation, from salesperson to customer and from customer to salesperson. Keep the lines open; avoid creating static with constant conversation.

INSTRUCTION SHEET IV, (page 2)

3. Demonstrate a genuine interest in your customer's needs. Look at your customer as they express their needs and respond positively to your customers questions and comments.

4. Keep the two-way communication flow moving at all times. Avoid dominating the conversation.

5. Permit your customer to stop the conversation and then think about what he/she wishes to say. If your customer stops the conversation, don't feel as if you must fill in the lapsed time.

STUDENT SELF-CHECK I

PRODUCT INFORMATION FACT SHEET

Directions: Select a consumer product, one in which you have an interest, and using another sheet of paper complete the following product information fact sheet. Include only information that is applicable to your chosen product. Ask your instructor to discuss this completed exercise with you.

STUDENT SELF-CHECK I, (page 2)

SELECTING AND ORGANIZING PRODUCT INFORMATION

PRODUCT ____________________

CUSTOMERS WANT TO KNOW

SIZE(S) ____________________

COLOR(S) ____________________

WEIGHT ____________________

MATERIAL(S) AND COMPOSITION ____________________

____________________ ____________________

CONSTRUCTION ____________________

____

FINISH ____________________

FEEL ____________________

ODOR OR TASTE ____________________

PACKAGING ____________________

PRICE(S) ____________________

BRAND NAME ____________________

DESIGNER ____________________

VOLUME OF SALES ____________________

EXCLUSIVENESS ____________________

ORIGIN ____________________

HISTORY OR BACKGROUND ____________________

____

____

STUDENT SELF-CHECK I, (page 3)

AVAILABILITY ______________________________

____

____

ADVERTISING ______________________________

____

____

SERVICES

DELIVERY ______________ CHARGES ______________

INSTALLATION ______________________________

CHARGES ______________________________

REPAIR ______________________________

SERVICING ______________________________

____

MONOGRAMMING AND/OR ALTERATIONS ______________

____

GUARANTEE ______________________________

____

REPLACEMENT ______________________________

____

ADDITION TO SETS (OPEN STOCK) ______________

____

STUDENT SELF-CHECK I, (page 4)

HOW TO USE

OPERATE ____

____

WEAR ____

PREPARE ____

ASSEMBLE ____

EAT ____

____

APPLY ____

ARRANGE ____

____

PLACE OR DISPLAY ____

HOW TO MAINTAIN

HANDLE ____

____

ADJUST ____

CLEAN ____

____

STORE ____

____

REPAIR ____

____

STUDENT SELF-CHECK I, (page 5)

OIL ____________________

____

GREASE ____________________

USES AND BENEFITS (CUSTOMER)

SENSORY PLEASURES ____________________

APPEARANCE ____________________

____

ODOR ____________________

SOUND ____________________

COMFORT:

WARMTH ____________________

COOLNESS ____________________

SOFTNESS ____________________

PROTECTION TO HEALTH ____________________

PRESTIGE ____________________

RELAXATION ____________________

CONTRIBUTION TO KNOWLEDGE ____________________

____

VERSATILITY ____________________

____

SERVICEABILITY ____________________

____

STUDENT SELF-CHECK I, (page 6)

EASE OF OPERATION ____________________

SAVINGS IN COST OF OPERATION AND UPKEEP ____________________

LABOR SAVING FEATURES ____________________

INSTRUCTOR'S FINAL CHECKLIST

PRESENTING PRODUCT INFORMATION

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When presenting the product information, the student:	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Presented factual information concerning the product's features	[ ]	[ ]	[ ]	[ ]
b. Emphasized customer benefits	[ ]	[ ]	[ ]	[ ]
c. Involved the customer as the information was being presented	[ ]	[ ]	[ ]	[ ]
d. Used the merchandise to highlight the information being given to the customer	[ ]	[ ]	[ ]	[ ]
e. Maintained two-way communication between self and customer	[ ]	[ ]	[ ]	[ ]
f. Gave a sufficient amount of information to the customer	[ ]	[ ]	[ ]	[ ]
g. Avoided presenting too much product information to the customer	[ ]	[ ]	[ ]	[ ]
h. Presented product information which would assist in selling the merchandise	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PRESENTING PRODUCT INFORMATION.

Your instructor will provide you a customer who wishes to obtain product information concerning a specific product. Present the product information to the customer.

RETAILING

PRESENTING AND DEMONSTRATING MERCHANDISE

INTRODUCTION

You learned in the previous module that effectively opening the sale is the first step to achieving a successful sale. After you have gained the customer's attention and after you have acquired information concerning his/her needs, you are ready to present and demonstrate the product(s). In this module, you will learn how to present and demonstrate the merchandise.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order which they are listed.

OBJECTIVE

Provided a customer and merchandise, present and demonstrate the merchandise for the customer. The presentation and demonstration must include each of the applicable criteria on the Instructor's Final Checklist.

Kentucky Department of Education

1982-83

LEARNING ACTIVITIES

1. READ about how to present and demonstrate merchandise. Your instructor will provide a reference.

   (or)____

2. LISTEN and OBSERVE as your instructor discusses and demonstrates how to present and demonstrate merchandise.

   (or)____

3. READ Instruction Sheet I, PRESENTING AND DEMONSTRATING MERCHANDISE.

   (or)____

4. READ Instruction Sheet II, PLANNING A SALES PRESENTATION.

   (or)____

5. CHECK YOUR KNOWLEDGE of planning a sales demonstration by taking Student Self-Check I, DESIGNING SALES PRESENTATIONS.

6. PRACTICE making sales presentations and demonstrations in the learning laboratory. (Ask your instructor for merchandise. Tape record the presentations. Videotape, if available.)

7. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY on the back cover.

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INSTRUCTION SHEET I

PRESENTING AND DEMONSTRATING MERCHANDISE

You have learned that the major reason for your being a salesperson is "to help customers satisfy their needs." You have learned that you must acquire knowledge of your products so that you can assist your customers in making wise buying decisions. When presenting and demonstrating merchandise, you must know the type of customer you are working with and the most efficient way to help them. The following guidelines will help you plan and present sales demonstrations.

1. The Decided Customer: These are people who know exactly what they need and want to buy.

    a. Characteristics:

    --They enter the store and immediately go to the displayed product or request immediate help from a salesperson.
    --They usually do not need or want a lot of detail about the product.
    --They may exhibit irritation if not immediately served by a salesperson.

    b. How to help the decided customer:

    --If this customer appears to be in a hurry, help him/her immediately, and avoid a long, planned sales presentation.
    --Answer his/her questions.
    --Process the sales transaction as quickly as possible.
    --Be cautious about trying to sell related items of merchandise.
    --Ask if he/she needs anything else.
    --If the customer is not in a hurry, you may wish to ask a few questions such as:

    (1) Why are you buying this product?
    (2) Have you used it before?
    (3) Did it satisfy your need?

    By asking such questions you will acquire first-hand product knowledge.
    --Suggest related items of merchandise if he/she is not in a hurry.

2. The Undecided Customer: These are the people who come into your store but they have not made up their minds as to what merchandise to buy. They may need your help in making a choice. It is your knowledge of the merchandise that will help you assist your "undecided customer."

INSTRUCTION SHEET I, (page 2)

a. Characteristics:

--They look at several items that are similiar.
--They compare price tickets.
--They try on many different items such as: coats, shoes, hats, dresses, etc.
--They ask questions such as:

(1) How do you apply this?
(2) Do you think this is me?
(3) Which of these items will last longer?
(4) I have to buy a gift for my spouse, but I can't decide which one of these items to buy.
(5) I am going to have to replace my toaster in the near future but I am not certain what kind I will want to buy.

b. How to help the undecided customer:

--Listen carefully to what each customer says. Try not to interrupt as he/she tells you what merchandise is needed.
--After you have carefully listened to your customer express his/her needs, make an effort to show merchandise that will satisfy the needs.
--Avoid presenting the same product information to each customer. By carefully listening to your customer express his/her personal needs, you will be able to determine what kind of product information is needed, the acceptable price range, and the appropriate merchandise.
--Always make an effort to show your customer how the merchandise will benefit him/her. Carefully tell your customer how the merchandise that you have will assist and satisfy the expressed needs.
--Always encourage the "undecided customer" to buy. Even though you may give your customer a sufficient amount of product information, you may explain the benefits of your merchandise, and you may tell and show how the merchandise will satisfy the needs, still the customer will say "Well, I think I will wait awhile before buying." Don't be discouraged. If you have been courteous and if you have helped the customer satisfy future needs, he/she will, in many cases, return and ask for your help again.

3. The Looking Customer: These are people who come into your store just to see what is on the sales floor. These people generally are not looking for any specific merchandise; however, if they are looking, they are potential buyers.

   How to serve the looking customer:

   a. Greet the "looking customer" as you do all people who come into the store and the department.

   b. When the customer tells you that he/she is "just looking," you say to them:

      --"While your looking you may wish to see the merchandise that has just been put on special sale. These shoes are on the table over by the entrance. If I can help you, please let me know."
      --"I appreciate it that you dropped in to look at the merchandise in our department. If I can help you, please let me know."
      --"Please look around. We have just received our new spring merchandise and I will be stocking it. You may wish to look at it."
      --"Here's a copy of our spring sales catalog. You may wish to look at it as you look around."
      --"Do you have anything in mind that I can help you find?" If the customer clearly informs you that he/she does not need assistance, politely excuse yourself by saying, "Please call me if I can help." Move away, and do not continue to try to open a sales presentation."

INSTRUCTION SHEET II

PLANNING A SALES PRESENTATION

You have learned the importance of acquiring product information, you have the ability to make good sales approaches, you know how to classify your customers as either "decided," "undecided," and "lookers." You are now ready to learn how to plan sales presentations. By planning your sales presentations, you will be able to avoid many of the errors that lead to no sales.

The following guidelines will assist you in planning your sales presentations. But do remember each customer has needs that are distinctive. Therefore, your presentations must be designed to help you assist each of your customers and satisfy his/her specific needs.

Guidelines for Planning Sales Presentations

1. When do you open the sales presentation?

   a. Begin your sales presentation when the customer:

   --Orally seeks product information; for example:

   (1) Do you have this clock in other colors?
   (2) What does the warranty on this television cover?
   (3) I saw a pair of black boots in the window. Do you have my size in stock?
   (4) Do you have a four-slot toaster in stock?
   (5) Is this pair of slacks washable?

   --Requests the price of an article of merchandise
   --Examines merchandise
   --Reads merchandise labels, hang tags, or price tickets
   --Requests your assistance in selecting an item of merchandise

2. How do you begin a sales presentation?

   a. Make an effort to determine the customer's specific needs by asking questions.

   --What color are you interested in?
   --That boot is one of the best selections in the store. What size do you wear?
   --The suit that you are looking at is made by Collins Brothers. What color and size do you prefer?
   --This oven has many labor saving features. How many people do you prepare meals for?

b. Listen carefully as your customer talks to you. He/she will reveal specific needs. However, if you constantly interrupt, you will not only irritate him/her but you will also not hear the specific needs.

The foundation of your sales presentation must be your customer's specific needs.

3. Maintain an open, two-way line of communication throughout the sales presentation.

a. Ask questions then listen carefully to the answers; for example:

--This model is available in white, copper, and chrome. Which do you prefer? (Listen for your customer's answer before proceeding).
--What are the colors in the room where you are going to place this rug? (Listen as your customer tells you before proceeding).
--Don't you think this new feature adds to the usefulness of this toaster? (Listen for your customer's reply).

b. Often the "undecided" and the "looking" customer will sell themselves during the sales presentation, if only you will listen as they discuss their needs.

--By listening you will also be able to determine the real needs of the customer.
--By not listening you can lose clues to your customers' expressions of real needs.
--By listening you will pick up clues for related merchandise sales.
--By not listening you can lose sales.
--By listening you can develop a following of customers who will return to you for solving many of their future merchandise problems.

4. Involve your customer by bringing him/her into the sales presentation by keeping the lines of communication open, for example:

a. Ask your instructor to become involved by appealing to the customers five senses whenever possible for example:

--"Sir, the controls of the television set are located here." "Won't you try them?"

INSTRUCTION SHEET II, (page 3)

--"Spray some of this fragrance on your wrist."
--"Mrs Allison, please try these new attachments." "Our demonstration is set up for you to see just how much time you can save with these new vacuum accessories."
--"To adjust these binoculars you need only to push this lever right or left as I have done. Here, give it a try."
--"Feel the comfort of this easy chair."

STUDENT SELF-CHECK I

DESIGNING SALES PRESENTATIONS

Directions: Using the following guidelines, design a sales presentation for the merchandise of your choice. Write your plan ON A SEPARATE SHEET OF PAPER.

--Name of the Merchandise

--Merchandise Information and Technology

--Benefits of the Merchandise

--Plans for Demonstrating the Merchandise

--Plans for Involving the Customer in the Sales Presentation

--Answers to Questions that the Customer May Have

--Answers to Objections That the Customer May Have

--Product Information Concerning Competing Products

When you have completed your sales presentation plans, review them with your instructor.

INSTRUCTOR'S FINAL CHECKLIST

PRESENTING AND DEMONSTRATING MERCHANDISE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In presenting and demonstrating the merchandise, the student's:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
1. Approach was:				
a. Alert	[ ]	[ ]	[ ]	[ ]
b. Sincere	[ ]	[ ]	[ ]	[ ]
c. Appropriate for the selling situation	[ ]	[ ]	[ ]	[ ]
2. Greeting was appropriate	[ ]	[ ]	[ ]	[ ]
3. Appearance was appropriate	[ ]	[ ]	[ ]	[ ]
4. Presentation:				
a. Was clear	[ ]	[ ]	[ ]	[ ]
b. Included customer benefits	[ ]	[ ]	[ ]	[ ]
c. Permitted customer an opportunity to talk and ask questions	[ ]	[ ]	[ ]	[ ]
d. Included sufficient amount of product information	[ ]	[ ]	[ ]	[ ]
e. Was neither too fast nor too slow	[ ]	[ ]	[ ]	[ ]
5. Voice:				
a. Volume was within normal speaking range	[ ]	[ ]	[ ]	[ ]
b. Clear	[ ]	[ ]	[ ]	[ ]
c. Tone varied	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PRESENTING AND DEMONSTRATING MERCHANDISE.

Your instructor will provide you merchandise. Make a sales presentation and demonstration.

RETAILING

HANDLING CUSTOMER OBJECTIONS

INTRODUCTION

Selling is the process of one person trying to help another person buy items of merchandise or services that will satisfy a need. When, during the selling process, the customer feels that the item or service being sold will not satisfy the need, he/she will voice an objection. These objections must be handled by the salesperson. In this module you will learn how to handle the different kinds of objections that your customers may have.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided examples of customer objections that could come up during sales presentations, handle each of the objections. All items on the Instructor's Final Checklist should be performed acceptably.

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LEARNING ACTIVITIES

1. READ about how to handle customers' objections. Your instructor will provide a reference.

   (or) ____

2. LISTEN as your instructor discusses how to handle customer objections.

   (or) ____

3. CHECK YOUR KNOWLEDGE of how to handle customer objections by taking Student Self-Check I, HANDLING CUSTOMER OBJECTIONS.

4. PRACTICE handling customer objections in the learning center. (Ask your instructor for the practice materials.)

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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STUDENT SELF-CHECK I

HANDLING CUSTOMER OBJECTIONS

Directions: On a seperate sheet of paper, answer the following questions concerning customers' sales objections.

1. (True or False) Customers' objections to buying are usually based on (1) need, (2) the product, (3) price, (4) place, and (5) time.

2. (True or False) Customers may avoid telling you their real reason for not buying an item of merchandise or service.

3. List the letter by the actions you would perform to handle customers' sales objections.

I would:

_____ a. Listen closely to the objection.

_____ b. Interrupt immediately when the customer begins to voice an objection.

_____ c. Try to clarify each objection and give the customer an honest answer.

_____ d. Try to clarify and find the real objection, if the objection voiced by the customer does not seem to be the real one.

_____ e. Avoid trying to force him/her to buy, if the customer's objections are so strong that he/she cannot be convinced to buy.

_____ f. Avoid arguing with the customer.

_____ g. Answer each objection as it is presented by the customer.

_____ h. Study my merchandise carefully and make an effort to find answers to the objections that may arise.

_____ i. Study my merchandise carefully and answer anticipated customer objections during the sales presentation and demonstration.

_____ j. Handle each customer's objection honestly; answer each question to the best of my ability; always remember that if I do maintain self-control, that the dustomer's goodwill will be kept, and even though I may lose one sale, he/she may return in the future.

INSTRUCTOR'S FINAL CHECKLIST

HANDLING CUSTOMER OBJECTIONS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

When handling each of the customer's objections, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Listened to each objection attentively	[ ]	[ ]	[ ]	[ ]
b. Clarified the objection	[ ]	[ ]	[ ]	[ ]
c. Answered each objection when it was voiced and did not try to avoid it	[ ]	[ ]	[ ]	[ ]
d. Demonstrated that he/she had knowledge of product	[ ]	[ ]	[ ]	[ ]
e. Answered each objection honestly	[ ]	[ ]	[ ]	[ ]
f. Avoided trying to force the customer to buy	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, HANDLING CUSTOMER OBJECTIONS.

Your instructor will give you examples of customer sales objections. Answer each of the objections.

RETAILING

CLOSING THE SALE

INTRODUCTION

You have learned how to approach customers, how to open a sale, how to present and demonstrate merchandise and how to answer customer objections. Now you are ready to learn the final step in performing a successful sale. In this module, you will learn how to close a sale.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a customer, merchandise, and a sales ticket, close the sale of the merchandise to the customer. Each applicable item on the Instructor's Final Checklist must be acceptably performed.

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LEARNING ACTIVITIES

1. READ about how to close sales. Your instructor will provide a reference.

   (or)____

2. READ Instruction Sheet I, THE IMPORTANCE OF CLOSING A SALE.

   (or)____

3. READ Instruction Sheet II, WAYS TO CLOSE SALES.

   (or)____

4. LISTEN as your instructor discusses and demonstrates how to close sales.

   (or)____

5. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, CLOSING SALES.

6. PRACTICE closing sales using the tape recorder in the learning laboratory. Ask your instructor for practice materials.

7. DEMONSTRATE to a class member how to close a sale.

8. ARRANGE with your instructor to complete this module by going through CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

THE IMPORTANCE OF CLOSING A SALE

In previous modules, you have learned how to approach customers, how to open a sale, how to present and demonstrate merchandise, and how to answer customer objections. You are now ready to acquire the knowledge and skill necessary to perform the last, and perhaps the most important, step of a sale which is how to close a sale.

Just how important is this final step? As a salesperson you may make your finest approach to a customer, open the sales in fine fashion, present product knowledge and an excellent demonstration of the merchandise's benefits; however when closing the sale, your customer for some reason that you can't understand did not purchase the merchandise. You will not, by any means, close each of the sales that you begin; however, there are some guidelines which will help you recognize when your customer is ready to purchase the merchandise. By knowing these guidelines, you will be more successful in helping your customer satisfy his/her needs and in closing your sales of merchandise.

Let's review what you have learned about the kinds of customers that you may have. Remember the "decided" or "hurried" customer? This person usually does not want a lot of product information nor a time consuming demonstration. He/she wants to buy immediately and be on their way. Therefore, you want to close the sale to this kind of customer quickly and accurately. You can recognize this kind of customer in the following ways.

A. Listening to what they say:

--"I am in a hurry. Please ring this up for me."

--"Will you help me. I must get to another appointment."

--"I only have an hour for lunch."

--"Here, check me out."

B. Observing their movements. The hurried or decided customer may:

--Tap fingers on the counter.

--Shift from one foot to the other.

--Have wallet, purse, or money out ready to pay.

--Have credit card in hand.

INSTRUCTION SHEET I, (page 2)

Now, the "undecided" customer will let you know when to close a sale by saying:

1. "You know, I believe you're right. This is the item I need."
2. "I think I'll take this one."
3. "Do you deliver?"
4. "Can you gift wrap it for me?"
5. "This is such a bargain."
6. "Can you have it installed for me?"
7. "Do you have a lay-away charge service?"
8. "If I buy this item, will your store keep an open-stock?"
9. "Can you have it packaged for mailing?"
10. "After comparing the three that you have shown me, I think this one suits me."
11. "This one is me, don't you think?"
12. "You have been so nice to show me the items. I think this one will make me happy."
13. "When can you have it delivered?"
14. "You certainly have sold me on this one."

The "just looking" customer will express their readiness to buy in much the same manner as the "undecided" customer. It is very important that you be a good listener because you may miss a clue given by the customer to close the sale if you are constantly talking and you fail to maintain two-way communication.

Are there other ways to close a sale? Definitely yes, you can ask the customer such questions as:

1. "Which of the pair of shoes do you prefer?"
2. "May I have it delivered?"
3. "Does it meet your needs?"

INSTRUCTION SHEET I, (page 3)

4. "Will this purchase be cash or charge?"

5. "Do you think that this item will satisfy your need?"

6. "Can I gift wrap your items?"

7. "I will be happy to package your merchandise."

8. "Do you know that we offer convenient charge accounts?"

INSTRUCTION SHEET II

WAYS TO CLOSE SALES

If you have made an appropriate approach to your customer, opened the sale with little difficulty, presented and demonstrated the merchandise to the satisfaction of your customer, and your customer has a definite need for the merchandise, you will be able to close the sale without any difficulty. Your customer will often close the sale by simply saying:

"You're absolutely right. This one will fill the bill for me."

"You've convinced me. I'll take it."

"I believe this one will do it. Will you please charge it to my account. Here's my credit card."

"You have shown me three of the items. I like this one. I believe you said that it is $124.95. Is this correct?"

What should you do when you hear the customer ask for the "natural" close?

1. Immediately stop your sales presentation and demonstration.
2. Ask your customer if they have any further questions.
3. Begin to process the sales transaction by completing the forms that are necessary for recording the sale.

Some other ways to close a sale are:

A. The Last Chance To Buy Close

If you honestly know that the item of merchandise will be sold and it is one of the last ones in the store you can use the Last Chance To Buy Close. Also, if you feel that the item will satisfy the customer's need, then this close can be used. You can use this close when the customer says, "I do like the merchandise, but I think that I should go home and consider buying it later." You can say, "this item of merchandise has been a very popular seller and we only have this one and one other in stock. It may not be here much longer." This close must not be used dishonestly nor should it be used as a normal routine in your sales closures.

B. The Lay-Away or Credit Close

If your customer should say, "I do like this item of merchandise but wasn't expecting to pay this much for it," you can reply by saying, "We do have a convenient lay-away credit plan and you would not have to make full payment for the item today. Would you consider this plan?" To use this close your store must, of course, have a lay-away credit plan. You can also suggest to your customer that your store does have a convenient charge account service.

INSTRUCTION SHEET II, (page 2)

In summary, there are many different kinds of sales closes. However, if you have:

--Made a positive approach

--Opened the sale with a friendly, positive attitude

--Listened to your customer express his/her needs

--Made a serious commitment in helping the customer satisfy expressed needs

--Presented and demonstrated the merchandise accurately

--Answered the customer's questions accurately and honestly

--Involved the customer in the presentation and demonstration

--Maintained two-way communication throughout the sale

--Listened for an opportunity to close the sale

you will be successful in closing sales, and be proud to have helped a customer purchase an item of merchandise that will satisfy his/her personal needs. Do remember you will not close each and every sale. Do, however, maintain a positive attitude. The people you do not sell today may be your buyers tomorrow. The people who say "I'll think it over", "Maybe I'll come back tomorrow", "I like it, but I just can't afford it right now," may return in the future to buy the merchandise.

INSTRUCTOR'S FINAL CHECKLIST

CLOSING THE SALE

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of closing the sale, the student:	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Asked the customer for a buying decision	[ ]	[ ]	[ ]	[ ]
b. Timed the close when the customer was in a positive, buying frame of mind	[ ]	[ ]	[ ]	[ ]
c. Made a positive close	[ ]	[ ]	[ ]	[ ]
d. Made a close that was helpful to the customer and not one that was pressing him/her to buy	[ ]	[ ]	[ ]	[ ]
e. Made a close that would help them sell merchandise	[ ]	[ ]	[ ]	[ ]
f. Accurately completed the sales ticket	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through each activity, your instructor will rate your performance using the Instructor's Final Checklist, CLOSING THE SALE.

Your instructor will provide you a customer, merchandise, and a sales ticket. Close the sale of the merchandise.

Module R-42

RETAILING

SUGGESTIVE SELLING

INTRODUCTION

As a salesperson in a retail establishment, you must be able to sell merchandise in a way that will be beneficial to your customers. One of these ways is using a method called "suggestive selling." In this module, you will learn how to sell merchandise using the "suggestive selling" method.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a customer who has purchased an item(s) of merchandise, sell the customer related items of merchandise. All items on the Instructor's Final Checklist should be performed acceptably.

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LEARNING ACTIVITIES

1. READ about how to use suggestive selling techniques. Your instructor will provide a reference.

   (or) ______________________________

2. CHECK YOUR KNOWLEDGE of suggestive selling by taking Student Self-Check I, SUGGESTIVE SELLING.

3. OBSERVE as your instructor demonstrates how to suggestive sell merchandise.

   (or) ______________________________

4. PRACTICE making suggestive sales demonstrations in the learning lab. Tape record your practice session. (Ask your instructor to evaluate your demonstration.)

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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STUDENT SELF-CHECK I

SUGGESTIVE SELLING

Directions: Answer each of the following questions about suggestive selling. Use a separate sheet of paper for your answers. Ask you instructor to review your answers with your.

1. As a salesperson you can use suggestive selling to help your customers. Read the following statements and write the letters of the ones that describe how you can help.

    a. The suggested item of merchandise will protect the item purchased by the customer.

    b. The suggested item is needed when the customer is using the original purchase.

    c. The suggested item will add to the appearance of the original purchased merchandise.

    d. If the customer buys a larger amount of an item, the cost per unit will be less.

    e. Suggesting additional merchandise can offer your customer timesaving and labor-saving convenience.

    f. Suggesting sale items of merchandise can save your customers money.

    g. Suggesting related items of merchandise can save your customers the trouble of having to return for additional purchases.

2. Timing a suggestion to a customer is very important. If the following statements about timing are true, write a + for true on your paper. If the statements are false, write a - for false on your paper.

    a. Always immediately suggest additional items when the customer brings an item to you and says, "I want to buy this."

    b. You can suggest an additional related item of merchandise before the original purchase has been processed.

    c. A good time to suggest additional merchandise is when the customer has told you that he/she is in a hurry.

    d. A good time to suggest additional merchandise is immediately after the customer has purchased an item of merchandise and does not appear to be in a hurry.

R

STUDENT SELF-CHECK I, (page 2)

3. When you are suggestive selling, there are recommended procedures to follow. List the letter of the statements that best describe these procedures.

   a. Suggest many items.

   b. Tell your customer the reason for the suggestion before making it.

   c. When making a suggestion, make one that is specific.

   d. Demonstrate and show the item to the customer.

4. One type of suggestive selling is related item selling. Read the following list of items and write items that could be sold as related items. Discuss your answers with your instructor.

   a. Fishing rod

   b. Ladies dress

   c. Boat

   d. House paint

   e. Hamburger

   f. Shoes

   g. Men's suits

   h. Stereo

   i. Camera

INSTRUCTOR'S FINAL CHECKLIST

SUGGESTIVE SELLING

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of suggestive selling, the student:

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a. Determined that the customer needed the merchandise..............................	[ ]	[ ]	[ ]	[ ]
b. Suggested a specific item of merchandise to the customer..........................	[ ]	[ ]	[ ]	[ ]
c. Told the customer why the suggestion was being made..............................	[ ]	[ ]	[ ]	[ ]
d. Demonstrated the product to the customer..	[ ]	[ ]	[ ]	[ ]
e. Closed the sale..........................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, SUGGESTIVE SELLING.

Your instructor will provide you with a customer who has purchased an item of merchandise. Suggestive sell additional items of merchandise to the customer.

Module R-43

RETAILING

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

INTRODUCTION

As a retail store employee you must be able to handle many different kinds of customer questions and complaints accurately and courteously while maintaining customer good will. Customers will ask questions and voice complaints concerning the location of departments, store services, and store policies and products. Your ability to handle these questions and complaints with accuracy and courtesy is a skill that is very important to your store's image. In this module, you will learn how to handle customers' questions and complaints.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform this task, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Given customers who have questions concerning store policy, store services, in-store locations, or customer facilities, answer each of the questions. All applicable items on the Instructor's Final Checklist should be acceptably performed.

(2) Given four customers who have complaints, orally handle each of the complaints. All applicable items on the Instructor's Checklist should be acceptably performed.

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LEARNING ACTIVITIES

1. READ about how to answer customer questions. Your instructor will provide a reference.

   (or) ______________________________

2. READ Instruction Sheet I, ANSWERING CUSTOMERS' QUESTIONS.

   (or) ______________________________

3. LISTEN as your instructor discusses and demonstrates how to answer customers' questions.

   (or) ______________________________

4. CHECK YOUR KNOWLEDGE of answering customer questions by completing Student Self-Check I, ANSWERING CUSTOMERS' QUESTIONS.

5. PRACTICE answering customer questions by using Student Self-Check II, PRACTICE IN ANSWERING CUSTOMERS' QUESTIONS.

6. READ about how to handle customers' complaints. Your instructor will provide a reference.

   (or) ______________________________

7. READ Instruction Sheet II, HANDLING CUSTOMERS' COMPLAINTS.

   (or) ______________________________

8. LISTEN and OBSERVE as your instructor discusses and demonstrates how to handle customer complaints.

9. PRACTICE handling customer complaints. Use Student Self-Check III, PRACTICE IN ADJUSTING CUSTOMERS' COMPLAINTS.

10. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

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INSTRUCTION SHEET I

ANSWERING CUSTOMERS' QUESTIONS

In the minds of customers, the store's employees are the representatives of the store. The contacts that customers have are, in most situations, with the salespeople, the stock clerks, delivery people, and credit department people, not with store management. As an employee of a retail establishment you will be asked many different types of questions by the customers. For example, you will be asked questions concerning:

--The location of merchandise and departments

--Store hours

--Services offered by the store:

1. charge accounts
2. delivery service
3. gift wrapping

--Customer facilities:

1. first aid

--Store policies:

1. refunds
2. exchanges

--Product information

You may even be asked to help locate a lost child. Whatever inquiry the customer may have, you should answer in a manner that will reflect a helpful and courteous store image. The following are helpful suggestions for answering customer inquires:

--Stop whatever you are doing to listen to the customer's inquiry.

--Always treat each customer's inquiry as being important. Show a genuine interest in your customer's question.

--Be attentive to the customer. Avoid interrupting when the customer is asking a question. "Listen."

--Be willing to fully answer the question.

--Should you be unable to answer a question, either refer the customer to someone who can or obtain the answer from another employee and relate it to your customer.

INSTRUCTION SHEET I, (page 2)

--Be prepared to fully answer customer inquires by:

a. Gaining knowledge of your store's policies.
b. Learning the locations of all the departments in your store.
c. Learning the locations of your store's customer facilities.
d. Learning the services offered by your store.

1. lay-away charge
2. credit (charges)
3. delivery
4. wrapping
5. others

--Treat each customer's inquiry in the same manner that you would want your own treated.

Your willingness to acquire a thorough knowledge of your store's policies, physical lay out, services, and facilities, will prepare you for answering most of the questions that customers will ask. When answering customers' questions, always remember you are the representative of your store. The customers' image of the store will be formed by how you answer their questions. It is your responsibility to maintain and support a good store image and to create customer goodwill. When answering customer questions, ask yourself "If I handle it this way will the customer want to come back and shop at our store?"

STUDENT SELF-CHECK I

ANSWER CUSTOMERS' QUESTIONS

Directions: Number your paper from 1-10. Match the letter that best describes the kind of questions you may be asked by a customer. Check your answers according to the procedures established by your instructor.

1. Does your store offer lay-away service?
2. I want to buy this for a friend as a gift, but I don't have time to wrap it. Will you wrap it for me?
3. I have just moved to town; does your store offer charge services?
4. Can you direct me to the hardware department?
5. Do you have a refrigerator with an automatic ice maker?
6. What are your store hours?
7. Will you be able to deliver this TV set?
8. A friend bought this for me, but it is the wrong size. May I exchange it?
9. Where is the credit department?
10. If this shirt does not fit my husband, may I return it for the correct size?

A. Store location

b. Store services

C. Store policies

D. Product

STUDENT SELF-CHECK II

PRACTICE IN ANSWERING CUSTOMERS' QUESTIONS

Directions: The following list of questions are ones that customers typically ask retail store employees. Ask a classmate to play the role of a customer and have him/her ask you these questions. It will help if you will tape record your practice session and play it back so that you can determine how well you are performing this important skill. Use the checklist at the end of these questions to evaluate your performance.

--Can you direct me to the hardware department?

--I want to pay my bill. Can you tell me where the credit department is located?

--I am buying this box of candy as a gift. Can you gift wrap and deliver it for me?

--Does your store have alteration services?

--May I place this item on lay-away?

--I am from the Anytown High School newspaper. We are soliciting for ads for the paper. Would your department be interested in taking an ad?

--I saw your ad in last Sunday's Anytown Gazette. One of the featured articles was a 19" portable color television set. Could you tell me where they are located? (You work in the lamp department.)

CHECKLIST FOR EVALUATING MY PERFORMANCE IN ANSWERING CUSTOMERS' QUESTIONS

		YES	NO
1.	I stopped what I was doing to help the customer.		
2.	I gave the customer my full attention.		
3.	I answered each question as I would want my own answered.		
4.	I fully answered each question.		
5.	I referred questions that I could not answer to my immediate supervisor.		
6.	I feel confident that I can answer customer questions.		
7.	I need additional practice in answering customer questions.		

INSTRUCTION SHEET II

HANDLING CUSTOMERS' COMPLAINTS

You have read references concerning how to handle customers' complaints. The following statements are guidelines that summarize what you have read. Practice these, and you should be able to adjust most of the complaints that cause your customers' unhappiness. The retailer who employs you will, in most cases, have established procedures and policies for adjusting customers' complaints. Learn these and follow them. Always, when adjusting complaints, make an effort to maintain the goodwill of the customers. Remember, you want them to remain customers. The policies and procedures generally will follow these guidelines.

--Avoid getting mad or excited--keep your cool.
--Do not become defensive.
--Give the customer your undivided attention: Listen attentively. Do not interrupt.
--Do not blame other employers for the problem.
--Make an effort to determine what the problem is.
--Avoid blaming the customer.
--Explain the facts to the customer.
--If an adjustment is to be made, make it immediately.
--If you cannot adjust/settle the customer's complaint immediately, ask for the help of the store employee who can.
--Fill out the store form that is used for making adjustments.

When you are adjusting customers' complaints, always remember that today's unhappy customer will be tomorrows "unhappy lost customer."

STUDENT SELF-CHECK III

PRACTICE IN ADJUSTING CUSTOMERS' COMPLAINTS

Directions: Practice adjusting the following customer complaints. Ask a classmate to play the role of the customer. Have your classmate use the checklist included in this Student Self-Check, (page 2) to evaluate your session. Tape the practice and play it back to determine if you are making the adjustments correctly.

Typical Customer Complaints:

1. I received this shirt as a Father's Day present, and it's a size 15½ and I wear a size 16½.
2. I bought this popcorn popper here two days ago, and the on-off switch is defective. I want my money back.
3. I have been standing around over in the hardware department for fifteen minutes, and not one salesperson has asked to help me.
4. I bought a refrigerator in your department last Friday, and I was told that it would be delivered Tuesday. I stayed home all day, and I did not receive my refrigerator. It's Wednesday. What happened to my refrigerator? Maybe I had best cancel my order.
5. You rang up the wrong price on that last item.

STUDENT SELF-CHECK III, (page 2)

Directions: Evaluate your classmate using the following checklist.

1. Your classmate gave you his/her undivided attention as you made the complaint.
2. Your classmate did not blame others for the problem.
3. Your classmate determined what the problem was and immediately addressed it.
4. Your classmate explained the facts of the problem.
5. Your classmate did not blame the customer for complaining.
6. Your classmate did not become defensive.
7. Your classmate avoided getting mad.
8. Your classmate listened to all of the complaint before making an effort to adjust it.
9. Your classmate made an effort to adjust the complaint immediately.
10. In your best judgement, your classmate adjusted each complaint wisely.

INSTRUCTOR'S FINAL CHECKLIST

ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) When answering the customers' questions, the student:				
a. Stopped all other activities...........	[ ]	[ ]	[ ]	[ ]
b. Gave each customer full attention......	[ ]	[ ]	[ ]	[ ]
c. Answered each question with accuracy and confidence	[ ]	[ ]	[ ]	[ ]
d. Referred customers to other store employees if unable to answer the question...............................	[ ]	[ ]	[ ]	[ ]
(2) In the process of adjusting the customers' complaints, the student:				
a. Avoided getting irritated or excited...	[ ]	[ ]	[ ]	[ ]
b. Did not become defensive...............	[ ]	[ ]	[ ]	[ ]
c. Gave the customers his/her undivided attention..............................	[ ]	[ ]	[ ]	[ ]
d. Did not blame others for the problem...	[ ]	[ ]	[ ]	[ ]
e. Made an effort to determine what the customers' problems were...............	[ ]	[ ]	[ ]	[ ]
f. Did not blame the customers............	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
g. If an adjustment was in order, made it immediately...........................	[ ]	[ ]	[ ]	[ ]
h. Listened without interrupting while the customer voiced the complaint......	[ ]	[ ]	[ ]	[ ]
i. Handled each complaint diplomatically..	[ ]	[ ]	[ ]	[ ]
j. Handled each complaint well enough so that the customer would still be a future customer........................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. As you go through the activities, your instructor will rate your performance using the Instructor's Final Checklist, ANSWERING CUSTOMER QUESTIONS AND HANDLING CUSTOMER COMPLAINTS

(1) Your instructor will provide you customers who will ask you questions concerning locations of merchandise, store services, and store policies. Answer each of the questions.

(2) Your instructor will provide you four customers with complaints. Orally adjust each of the complaints.

RETAILING

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

INTRODUCTION

Shoplifting is a criminal act that happens when a person steals items of merchandise from a retail establishment. It is an expensive crime that costs both merchants and honest customers many dollars every year. As an employee of a retail establishment, one of your tasks will be to prevent, detect, and report this crime. In this module, you will learn how to prevent, detect, and report shoplifting.

DIRECTIONS

Read the objectives below. If you think that you are already able to perform this task, read the Check-Out Activities on the back cover. Then either arrange with your instructor about doing the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVES

(1) Provide a case problem involving shoplifting, answer the questions concerning the incident. Each question should be correctly answered.

(2) List seven steps that you will practice to prevent shoplifting. This must be done with 100% accuracy.

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LEARNING ACTIVITIES

1. READ about how to prevent, detect, and handle shoplifting. Your instructor will provide a reference.

   (or)____

2. LISTEN TO YOUR instructor discuss, "How to Prevent, Detect and Handle Shoplifting."

3. READ Instruction Sheet I, METHODS USED BY SHOPLIFTERS.

   (or)____

4. READ Instruction Sheet II, PREVENTING SHOPLIFTING.

   (or)____

5. READ Instruction Sheet III, DO'S AND DONT'S FOR HANDLING SHOPLIFTING SUSPECTS.

   (or)____

6. CHECK YOUR KNOWLEDGE by completing Student Self-Check I, DETECTING AND REPORTING SHOPLIFTING.

7. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITIES listed on the back cover.

The development of this material is the result of a cooperative effort between the Bureau of Vocational Education and the Office of Research and Planning, Kentucky Department of Education. The Kentucky Department of Education does not discriminate on the basis of race, color, national origin, age, religion, marital status, sex or handicap. This publication was printed with state funds.

INSTRUCTION SHEET I

METHODS USED BY SHOPLIFTERS

Clothing--Watch carefully any suspicious customer who is wearing loose or baggy clothing. Look for clothes with large pockets, coats draped over arms, hooks or fasteners on garments, even hats. Some shoplifters will place small items under hats. The basic rule is to observe any suspicious customer who is wearing loose or baggy clothing, as it would be easy to conceal an item which the person plans to shoplift.

Packages--Boxes with false hinged lids on the bottom or top side are sometimes used to shoplift. Look for customers who lay packages on or near loose merchandise or displays.

Folded Newspapers--Observe persons carrying folded newspapers to see if they lay the paper near merchandise or handle merchandise so it can be tucked into the paper.

Open Bags or Sacks--If a person is carrying an open bag, observe as he/she passes merchandise displays to see if any articles are dropped into the bag.

Handbags--Some shoplifters steal handbags and use as their own handbags. Know your merchandise so that you can spot an item that may have been shoplifted.

Jewelry--Shoplifters often take jewelry and wear it as their own. Also, shoplifters may switch small items, such as jewelry, while the salesclerk is not looking.

Distractors--These shoplifters usually work in pairs. One will attempt to distract the salesclerk while the other shoplifts.

Books--Inside pages will be cut out where small items will fit inside the book.

These are just a few examples of how shoplifting occurs. Remember, carefully observe any customer who looks nervous, does not want any assistance, and constantly looks to see if he/she is being watched. An alert salesclerk is a store's best defense against shoplifting.

INSTRUCTION SHEET II

PREVENTING SHOPLIFTING

--Greet all customers as they enter the store or department. Courtesy and attention is good for business, but bad for shoplifters. By closely watching customers and given them courteous attention, much shoplifting can be prevented.

--Watch the customer's eyes and hands. Jittery eyes and nervous hands are frequent clues.

--Keep a watchful eye on people who just wander about the store and do not want any assistance from any salesclerk. They could be just waiting for the opportune time to shoplift.

--Be on the lookout for persons who enter the store carrying large packages, big purses, shopping bags. or wearing unusually bulky clothing. These maybe tools used by shoplifters.

--Be on your guard against distracting situations. Pros often work in pairs--one to distract you while the other person rips you off.

--Avoid placing more than one valuable item on the counter at a time. This can add to the temptation for a person to shoplift. Especially be careful with expensive items.

--Never leave locked display cases unlocked--even for a moment.

--Do not let customers carry several articles of clothing into a dressing room at a time. Many stores place an employee at the entrance of the dressing rooms, issuing tags to the customers as they enter the fitting area. On leaving the dressing rooms, the customer must show the tag and the proper number of garments.

INSTRUCTION SHEET III

DO'S AND DON'TS FOR HANDLING SHOPLIFTING SUSPECTS

DO Keep the suspect under constant attention, concentrating on the location of the concealed goods.

DO Attract the attention of another employee to witness and assist in the apprehension. Use a specially devised code system, if necessary.

DO Alert the manager, assistant manager, or any special security personnel on duty in the store. Apprehension should be made by security personnel or store manager.

STUDENT SELF-CHECK I

DETECTING AND REPORTING SHOPLIFTING

Directions: Listed below are the activities that you should do if you suspect or detect someone shoplifting. There are also some things listed that you should not do. Number your paper 1 to 12. Identify those activities that you should do by writing YES beside the number. Identiy those activities you should not do by writing NO beside the number. Check your answers according to the procedures established by your instructor.

1. If I suspect or detect someone shoplifting, I will report this to the appropriate store authority.
2. I will carefully observe the actions of the person that I suspect of shoplifting and report these actions to the appropriate store authority.
3. If I suspect or detect shoplifting, I will follow the procedures established by the store.
4. I will not try to find another store employee to help me witness the shoplifting.
5. I will report exactly what I witnessed if requested to do so by appropriate authorities.
6. I will greet each customer as he/she enters my department or store.
7. I will make an effort to know the number and kind of merchandise that is on display in my department.
8. I will lock each security display case after replacing the merchandise.
9. I will make an effort to observe each of my store/department customers.
10. I will give each of my customers courteous attention.
11. I will show only one valuable item of merchandise at a time.
12. I will maintain a neat department/store so that my view of customers is not blocked.

INSTRUCTOR'S FINAL CHECKLIST

PREVENTING, DETECTING, AND REPORTING SHOPLIFTING

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
(1) When the case problem is solved the student will have:				
a. Listed any of the three clues that alerted John to the potential shoplifter..........................	[ ]	[ ]	[ ]	[ ]
b. Listed the three things that John should have done.....................	[ ]	[ ]	[ ]	[ ]
c. Answered and explained accurately how John should have dealt with the potential shoplifter................	[ ]	[ ]	[ ]	[ ]
(2) When listing seven ways to prevent shoplifting, the student included:				
a. Greet each customer as they enter department..........................	[ ]	[ ]	[ ]	[ ]
b. Lock security display cases..........	[ ]	[ ]	[ ]	[ ]
c. Keep a neat department...............	[ ]	[ ]	[ ]	[ ]
d. Know kinds of and amounts of merchandise in department...............	[ ]	[ ]	[ ]	[ ]
e. Show only one expensive item of merchandise at one time..............	[ ]	[ ]	[ ]	[ ]
f. Be observant at all times............	[ ]	[ ]	[ ]	[ ]
g. Avoid setting up displays that will block view in department........	[ ]	[ ]	[ ]	[ ]
h. Follow store policies concerning prevention of shoplifting............	[ ]	[ ]	[ ]	[ ]
i. Others..............................	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITIES

The statements below explains the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, PREVENTING, DETECTING AND REPORTING SHOPLIFTING.

(1) Your instructor will provide you with a case problem involving shoplifting. Answer the questions concerning the incident.

(2) List seven steps that you will practice to prevent shoplifting.

RETAILING

ASSISTING IN TRAINING NEW EMPLOYEES

INTRODUCTION

After you have become a skilled retail employee and you have demonstrated your abilities to adequately perform the tasks of your job, you may be requested to assist in the training of new employees. When you are asked by your supervisor to assist in this activity, remember that you were once a new employee and someone helped you learn the on-the-job tasks that you are now doing. In this module, you will learn how to assist in training new employees.

DIRECTIONS

Read the objective below. If you think that you are already able to perform this task, read the Check-Out Activity on the back cover. Then either arrange with your instructor about doing the Check-Out Activity,

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Provided a retailing task and a student who cannot perform the task, train the student to perform the task. All items on the Instructor's Final Checklist should be performed acceptably.

Kentucky Department of Education

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LEARNING ACTIVITIES

1. READ Instruction Sheet I, ASSISTING IN TRAINING NEW EMPLOYEES.

   (or)____________________________________

2. LISTEN as your instructor discusses how to train new employees.

3. CHECK YOUR KNOWLEDGE of training new employees by completing Student Self-Check I, ASSISTING IN TRAINING NEW EMPLOYEES.

4. PRACTICE training a new employee in the learning laboratory. Ask your instructor for practice materials.

5. ARRANGE with your instructor to complete this module by going through the CHECK-OUT ACTIVITY listed on the back cover.

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INSTRUCTION SHEET I

ASSISTING IN TRAINING NEW EMPLOYEES

Think back to times in your life when you were learning to perform tasks which were new to you. Then try to remember how you felt when someone simply said, "Let me help by showing you how to do it." Did you feel relieved and less frustrated? Someone, maybe it was your mother or father, a friend or a teacher, or maybe it was one of your on-the-job associates or your supervisor who said these words. It is these words that you can now use when you are requested by your supervisor to assist in training new employees. Remember that when you are asked to help train new employees, your supervisor is also saying, "You have shown me that you can adequately perform the job, and I feel that you will be able to help in training new employees." When you are asked to assist in training new employees, you have been complimented by your supervisor. Your supervisor is confident that you will use the following guidelines when training:

1. Know and be able to show the associate worker exactly what task or tasks you are helping them learn.

   For example, your supervisor says to you, "Will you show the new salesperson in your department how to write a sales ticket?" Please remember that he/she should be able to write one legibly, be free of mathematical errors, and include all of the information that the store requires.

2. Describe to your associate worker exactly what you are helping him/her learn, and tell him/her what the store expects when the task is finished.

   For example: "Our department manager has asked me to help you learn how to handle a customer's refund transaction so that the accounting department will receive the correct information. We are expected to enter all of the information legibly, and each of the mathematical computations are to be made without error."

3. Give your associate worker information about how to do the task. You can do this orally or you can, if your store has it, give it to them in writing. If you give your associate oral instructions, do give them a chance to ask questions as you go through each of the steps. If your associate asks you to repeat a step, do so. Stop your instruction periodically and ask, "Please, do you have any questions?" Answer each question when your associate asks it. When you have completed the oral instruction, once again ask your associate, "Do you have any questions concerning how to do the task?" Again, answer each question when it is asked. Do have patience; remember, someone helped you learn how to do the task.

INSTRUCTION SHEET I, (page 2)

4. Show your associate how to do the task. Demonstrate the exact procedures that you have discussed. If you can, demonstrate the steps in a realistic situation.

   For example: If you are helping your store associate learn how to build a window display, build a window display while your associate observes. Discuss the safety procedures that you are following as you construct the display.

5. After you have demonstrated for your associate how to perform the task, let him/her practice doing it. If safety measures are involved in performing the task, it is best that you stay with your associate as he/she practices doing it. Watch carefully to insure that your associate does not make an error that can cause an accident.

6. When you and your associate feel confident that he/she can perform the task at a level sufficient to meet your store's requirements, have him/her do it in a actual situation.

   For example: Your associate is ready to write a sales ticket for a customer. Tell your associate that you will be available should there be any questions during the first actual experience. However, you should not over-supervise the work. Check the completed sales ticket immediately after your associate has completed it, and discuss any errors which have been made. If your associate avoids making errors, you have done your job well. Permit your associate to process additional sales tickets. Spot check to determine the degree of proficiency.

7. In summary, when you are requested by a supervisor to assist in the training of a new employee:

   --Be able to perform the task or tasks.
   --Tell your associate exactly what task or tasks you will be helping him/her learn.
   --Describe how your store expects the task to be done and how well he/she is expected to do it.
   --Give your associate enough information so that he/she will know how to perform each task.
   --Show your associate how to perform the task or tasks.
   --Let your associate practice performing the task.
   --Arrange for your associate to do the task or tasks in an actual situation.
   --Constantly give your associate information about how well he/she is performing the task or tasks.

STUDENT SELF-CHECK I

ASSISTING IN TRAINING NEW EMPLOYEES

Directions: On a separate sheet of paper, write the numbers of the following steps in the correct order. When you have finished, check your answers according to the procedures established by your instructor.

1. Have your associates practice performing the task.
2. Be able to perform the task.
3. Tell your associates exactly what task or tasks you will be help- ing them learn.
4. Describe how your store expects them to do the task and how well they are expected to do it.
5. Give your associates enough information that they will know how to perform each task.
6. Show your associates how to perform the task.
7. Constantly give your associates information about how well they are performing the task.
8. Arrange for your associates to do the task in an actual situation.

INSTRUCTOR'S FINAL CHECKLIST

ASSISTING IN TRAINING NEW EMPLOYEES

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

In the process of training the student to perform the task, the student instructor:

		Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
a.	Was able to perform the task..............	[ ]	[ ]	[ ]	[ ]
b.	Clearly defined to the learner the task to be learned...........................	[ ]	[ ]	[ ]	[ ]
c.	Clearly described how the learner was to perform the task	[ ]	[ ]	[ ]	[ ]
d.	Gave the student learner a sufficient amount of information to enable him/her to know how to perform the task	[ ]	[ ]	[ ]	[ ]
e.	Maintained a two-way system of communication that permitted the student learner to ask questions.................................	[ ]	[ ]	[ ]	[ ]
f.	Demonstrated for the student learner how to perform the task..................	[ ]	[ ]	[ ]	[ ]
g.	Permitted the student learner to practice performing the task.......................	[ ]	[ ]	[ ]	[ ]
h.	Observed the student learner's practice and offered help when it was needed.......	[ ]	[ ]	[ ]	[ ]
i.	Gave the student learner immediate progress reports..................................	[ ]	[ ]	[ ]	[ ]
j.	Observed the student learner perform the task in a simulated situation............	[ ]	[ ]	[ ]	[ ]

INSTRUCTOR'S FINAL CHECKLIST, (page 2)

The student should be evaluated according to the performance ratings in the box. Indicate on a separate sheet of paper whether the student's performance for each item is Fully Accomplished, Partially Accomplished, Not Accomplished, or under certain circumstances, Not Applicable.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will decide which learning activities must be repeated.

	Fully Accomplished	Partially Accomplished	Not Accomplished	Not Applicable
k. Evaluated the student learner's performance..............................	[ ]	[ ]	[ ]	[ ]
l. Encouraged the progress of the student learner..................................	[ ]	[ ]	[ ]	[ ]
m. Assisted the student learner in acquiring the ability to perform the task...........	[ ]	[ ]	[ ]	[ ]

CHECK-OUT ACTIVITY

The statements below explain the activity you must be able to complete in order to finish this module. As you go through the activity, your instructor will rate your performance using the Instructor's Final Checklist, ASSISTING IN TRAINING NEW EMPLOYEES.

Your instructor will provide a retailing task and a student. Train the student to perform the task.